

## **2005 Meeting Minutes W&I EITC Issue Committee Meetings**

- September 22, 2005
- August 18, 2005
- July 21, 2005
- June 16, 2005
- May 19, 2005
- May 6, 2005
- March 17, 2005
- February 17, 2005
- January 20, 2005

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### **Issue Committee (W & I EITC) Meeting Minutes**

*September 22, 2005  
Teleconference*

#### **Program Owner**

- Blum, Alisa, Project Manager, EITC Stakeholder Engagement
- Watkins, Lisa, EITC Office Detailee

#### **Designated Federal Official**

- Sandra Ramirez, TAP Program Manager

#### **Committee Members Present**

- Banks, Jim, Bozeman, MT
- Brodbine Ghoniem, Elizabeth, Winchester, MA
- Bronziarczyck, Robert, Romeoville, IL
- Edwards, C. Morgan, Charlotte, NC
- Handelman, Gwen, Fort Lauderdale, FL
- Jaffke, Cheyanna, Placentia, CA
- Karwin, Thomas, Santa Cruz, CA
- Malcolmson, Leslie, Detroit, MI, Chair
- Morrell, Jack, Mandan, ND
- Reder, Joe, Richland, WA
- Vivona, Alexander, Sarasota, FL
- Woo, Lillian, Durham, NC, Vice Chair

#### **Committee Members Absent**

- Wendt, Charles, Iola, TX
- Wilson, Nan, Overland Park, KS



## **TAP Staff**

- Jenkins, Audrey Y. , TAP Analyst
- Odom-Russell, Meredith, TAP Management Assistant

## **Other Attendees**

- Caine, Roxie – Center on Budget and Policy Priorities
- Meeks, Amy – National Women’s Law Center

## **Welcome**

Malcolmson opened the meeting at 11:03 am ET.

## **Roll Call (quorum has been met)**

### **Approval of Meeting Minutes**

Malcolmson discussed the changes that were made to the July and August meeting minutes. July and August meeting minutes were approved by consensus with changes. A copy of revisions will be sent to the committee.

### **Chair Report**

Malcolmson presented her EITC PowerPoint for the annual meeting to the Joint Committee at the September face-to-face meeting. All feedback will be incorporated. The Joint Committee will be meeting with the IRS Commissioner in D.C. before the start of the annual meeting. Handelman, TAP Chair, encourages all members to go to TAPSpeak, the TAP intranet, to view the list of proposed discussion items and to share with her any other possible discussion items or suggestions. Malcolmson noted that continuing members will be able to select their choice of issue committees for the new year. There will be two new issue committees – the Volunteer Income Tax Assistance (VITA) issue committee and the Taxpayer Assistance Centers (TAC) issues committee.

### **Review Assignments**

- Submit suggestions for Orientation Package
- Submit Comments for the EITC Website

## **Agenda Items**

### **Subcommittee 1 – Report out**

#### **EITC Orientation Package**

The latest draft of the document was shared with the members; all feedback has been incorporated. The document will be distributed at the Annual Meeting. The TAP handbook contains an extensive glossary, therefore the glossary in the EITC Orientation Package need only include those terms that will be used for the committee’s work. Woo needs information for the who’s who section. Woo requests the staff’s assistance in filling in the descriptions of duties of the program owners. Woo requests that these descriptions be sent to her by September 30th. The Joint Committee requests these orientation materials be distributed to all committee chairs as a model for them to do orientation materials for other committees. Handelman suggests these materials go out quickly. The idea is to send this orientation package to new members before the meeting so they may have an idea of what work the committee has focused on and completed over, the last three years. It will also be distributed to returning members regardless of their tenure on the EITC Committee. Malcolmson suggested that all materials going out to committee members, be sent in a single package. The EITC Office will include a sample of marketing materials in the package. Blum said that although the 2006 campaign is still being developed, existing materials could be given to the members.



## Subcommittee 2 - Report Out

### EITC Website-Architecture

The committee suggest that the EITC website be structured around five major headings. Blum explained that functionality and software of the EITC website cannot be changed; the irs.gov site houses hundreds of sites for hundreds of program owners so the software must remain uniform across all sites. What can be done is reorganization of material. Karwin noted that the members would like to develop a hierarchy of information so that there would be no more than five links on any given page. Another strong recommendation is the reduction of information overload (duplicating information that is available on other pages of irs.gov website), with the remaining information consolidated within the hierarchy, so information is provided on only on one page. Blum explained that the EITC office does not own the website, only web pages; she'll share what the committee submits with the relevant staff.

**Action** – Final recommendations will be forwarded to the program owner. Blum requested that both subcommittee 2 and subcommittee 3 comments be submitted under one cover letter.

## Subcommittee 3 – Report Out

### EITC Website-Content

All changes were incorporated and the revised recommendation was shared via e-mail with the full committee.

**Action** – Malcolmson will work with Karwin and Vivona to redo the introduction to each recommendation and merge the two with on cover letter.

### Meeting Close

Blum thanked the entire committee for all of their hard work and the dedication that was given to the EITC office and wished the non-returning members well.

Malcolmson would like to see all orientation documents that will be handed out to the new and returning members in November. All pre-reads will be sent prior to the Annual Meeting.

### Action/Assignment Review

#### Chair

- Cover letter for EITC website architecture and content recommendations
- Submit final annual committee self-assessment

#### Committee Members

- Review list of discussion items with Commissioner and provide any additional comments to Handelman

#### Jenkins

- Provide description of duties to Woo for orientation document.



## **Issue Committee (W & I EITC) Meeting Minutes**

*August 18, 2005  
Teleconference*

### **Panel Members in Attendance**

- Jim Banks, Bozeman, MT
- Robert Broniarczyk, Romeoville, IL
- Morgan Edwards, Charlotte, NC
- Gwen Handelman, Fort Lauderdale, FL
- Thomas Karwin, Santa Cruz, CA
- Leslie Malcolmson, Detroit, MI - Chair
- Al Vivona, Sarasota, FL
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC – Vice Chair

### **Panel Members Absent**

- Elizabeth Ghoniem, Winchester, MA
- Cheyanna Jaffke, Placentia, CA
- Jack Morrell, Mandan, ND
- Charles Wendt, Iola, TX
- Joe Reder, Richland, WA

### **Program Owner**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC
- David Knight, Policy Analyst, EITC Systems Operations

### **Designated Federal Official**

- Sandra Ramirez, TAP Program Manager, Brooklyn, NY

### **TAP Staff**

- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY
- Meredith Odom-Russell, TAP Management Assistant, Brooklyn, NY

### **Welcome/Opening of Meeting**

Malcolmson opened the meeting at 2:02pm ET, welcomed all members, staff and guests.

### **Public Participants**

Roxie Caines, Center on Budget and Policy Priorities, Washington, DC.

### **Roll Call (quorum was met)**

### **Review Assignments/Action Items Handelman**



- Make revisions and add conclusion to the EITC Assistant – **completed**

#### **Malcolmson**

- Send the final recommendation on the EITC Assistant to David Williams –**completed**

#### **Woo**

- Send out an email to committee members to describe an introductory EITC Package for the new members – **completed.**
- Work with sub-committee to develop the introductory package – **in progress.**

#### **Jenkins**

- Send the more current June results on the preliminary 2004 certification test data to committee – **completed.**

#### **Karwin**

- Solicit input from members on EITC website structure and work on drafting proposal – **in progress.**

#### **Vivona**

- Solicit input from members on EITC site content and work on drafting proposal – **in progress**

#### **Full Committee**

- Submit Comments to Karwin, Vivona and Woo – **in progress.**

#### **Public Input**

None

#### **Program Owner Report**

Knight requested the committee’s input on what new electronic capabilities the IRS could develop that would appeal to taxpayers who claim the EITC and tax preparers who prepare EITC returns. He is interested in the committee’s opinion regarding possible web-based applications. For example, what issues may arise if IRS develops an electronic procedure to submit qualifying child certification forms or are there any other previously unidentified web-based applications that may be of interest to EITC taxpayers and/or the preparers who help them?

Some questions were asked by the members. Knight and Blum clarified the affidavit process. It became clear that the committee would need more time and thought as well as possibly more background knowledge or information in order to provide input so this issue will be deferred to the new EITC Committee that would be formed at the Annual Meeting. Knight confirmed that there is time to receive input from committee later in the year around December.

#### **Subcommittee 1 – EITC Orientation Package**

Woo received a modest response regarding this issue and is waiting for drafts from members. She expects to have something to circulate before the next meeting. Once she circulates the draft, if



anyone has further comments you may contact Woo with your suggestions. The Package will be reviewed at the September meeting.

### **Subcommittee 2 – EITC Website Architecture**

Karwin had some observations about the website pertaining to the number of links represented on two major pages of the website. The two pages overlap one another. Both pages have an excessive number of links. On the information page there are 90 links. There should be an effort to make the information available to the visitor to the site with as few clicks of the mouse as possible. There is very little guidance available for the user as to how to find their way through all of the information. The information is broken out under various headings, but the headings are not as useful as others that have been developed. The website should be totally reconstructed. The data should be reorganized and should be limited to the EITC program omitting more general information. Karwin suggests deleting links to pages that are not specific to EITC instead refer users to the [irs.gov/individual](http://irs.gov/individual) page. The main page of the EITC should look like a main page and not an article as it does now. The duplication of information from the main page and the information page should be resolved. An email will go out to all members to provide feedback to Karwin. He would like to focus on identifying a short list of major subdivisions of the EITC information. Malcolmson asked Jenkins to assist in setting up a teleconference for this subcommittee.

### **Subcommittee 3 – EITC Website Content**

Vivona stated that when you go to the site there are three or four major issues that should come up right away. General terms should be used. 1) Are you a citizen of the US? 2) Do you have valid Social Security Numbers for you, your spouse and children? 3) And are you filing a joint return? These items should be up so you do not have to go through the other links. General terms should be used. Blum advised the committee not to focus on words at the site since so many types of users visit, but, that if there are chunks of information that are redundant or entire pieces of copy not relevant anymore, or missing information to note that. Vivona will send an email to Jenkins to share with full committee to get responses and will consolidate them.

### **Annual Self-Assessment**

The committee's first draft of the annual self assessment is due September 12, 2005. Malcolmson requested that Jenkins send a blank annual assessment report form to all members, as well as the 2004 and 2003 self-assessment reports. Malcolmson would like the full committee's input. Responses should go to Malcolmson and Jenkins.

### **Action Items Malcolmson**

- Solicit an alternate meeting date for September via e-mail to all.

### **Jenkins**

- Set up a conference call on the EITC Website Architecture.
- Send committee blank 2005 self-assessment form and prior years' completed assessment forms.

### **Full Committee**

- Prepare input for the annual self assessment and send to both Malcolmson and Jenkins.
- Provide feedback on EITC website architecture and content to Karwin and Vivona.



- Provide feedback to Woo on the Orientation package.

**Woo**

- Prepare the Orientation Package for approval in September.

**Karwin**

- Prepare the feedback on the EITC Website Architecture for approval in September.

**Vivona**

- Prepare feedback on EITC Website Content for approval in September.

**Closing/Assessment**

The regularly scheduled September 15, 2005 meeting is in conflict with the September Joint Committee Face to Face meeting in Las Vegas. Malcolmson will solicit an alternate date via email.



## **Issue Committee (W & I EITC) Meeting Minutes**

*July 21, 2005  
Teleconference*

### **Panel Members in Attendance**

- Jim Banks, Bozeman, MT
- Robert Broniarczyk, Romeoville, IL
- Philip Cimino, Staten Island, NY
- Gwen Handelman, Fort Lauderdale, FL
- Thomas Karwin, Santa Cruz, CA
- Leslie Malcolmson, Detroit, MI - Chair
- Jack Morrell, Mandan, ND
- Joe Reder, Richland, WA
- Charles Wendt, Iola, TX
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC – Vice Chair

### **Panel Members Absent**

- Elizabeth Ghoniem, Winchester, MA
- Morgan Edwards, Charlotte, NC
- Cheyanna Jaffke, Placentia, CA
- Robert Maziarz, Hainesport, NJ
- Al Vivona, Sarasota, FL

### **Program Owner**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC

### **Designated Federal Official**

- Sandra Ramirez, TAP Program Manager, Brooklyn, NY

### **TAP Staff**

- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY
- Meredith Odom-Russell, TAP Management Assistant, Brooklyn, NY

### **Welcome/Opening of Meeting**

Malcolmson opened the meeting at 2:02pm ET, welcomed all members, staff and guests.

### **Roll Call**

Quorum met

### **Review Agenda**

Malcolmson proposed to amend agenda to add the review of final comments on the EITC Assistant.





### **Approval of Meeting Minutes**

The June 16, 2005 minutes were approved by consensus.

### **Review Assignments**

#### **Action Items**

#### **Blum**

- Email Jenkins the preliminary (May) 2004 Certification Test data for distribution-**completed**
- Email Jenkins the 2nd interim 2003 EITC Report to Congress-**completed**
- Email the Booz Allen discussion notes-**completed**

#### **Jenkins**

- Send hard copies to the committee of the 2003 EITC Report to Congress-**completed**
- Send 2004 Certification Test data to Kim Glassman-**completed**
- Send 2nd interim 2003-**completed**

#### **Public Input**

No public attendees.

#### **Agenda Items**

#### **EITC Assistant – Final Comments**

Maziarz sent out a final version of comments to the EITC Assistant on July 19, 2005. Handelman will make a few revisions and add a conclusion. There are two recommendations that should be included: 1) under 2C, in the introductory material, users should be advised that the EITC Assistant applies the "15 rules" found in Publications 17 and 596 to the users individual situation. Without this note, users who have encountered the "15 rules" may wonder if the EITC Assistant is entirely different. (The 15 rules apply to taxpayers with and without children). 2) under "clarify", the very last item refers to retirement income. Examples of earned income, such as interest, dividends, annuity, social security, and railroad retirement, should be given. Earnings after retirement are earned income. Earned income includes wages and other compensation earned after retirement even though there is also "unearned" retirement income (like pensions or other annuities). Handelman will include this in the revision.

#### **EITC Orientation Package**

Woo—wanted to discuss a concern mentioned by a few members at the May meeting regarding ways that new members can speedily come to understand the EITC and issues surrounding it. A number of members commented that it took some time for them to get up to speed. Discussion followed about a packet for new committee members that describes the basics of the EITC and the work of this particular committee over the history of TAP. Morrell notes that the EITC assistant is a good place to start (members can learn by using it). Woo mentioned that IRS publication 596 is also a good source. Wilson noted a mentoring program where new members would be assigned to more seasoned members. Handelman noted that an overview by the program owners would be beneficial. Wendt stated that if the program owners tell the committee what the problems are and what they want from the members it would be helpful. Woo added that she would like the program owners to have a task ready in November for the members to work. Broniarczyk felt that publication 596 and a synopsis



from the committee's annual assessment would be good tools to orient new members. Woo will send an e-mail to members to join a subcommittee to look at these issues.

It is expected that the TAP annual meeting will be extended to allow for longer area and issue committee meetings. It was suggested that the EITC program owners give a presentation on EITC basics as well as describe how the committee fits into their work, placing the committee within the context of the larger IRS structure. It was suggested that the program owner come to the Annual meeting with an assignment or two for the committee to work. The assignments will help develop subcommittees. Program owners were reminded that there will be a high number of new committee members who will just be familiarizing themselves with the intricacies of the EITC and learning the ropes of TAP.

**Program Owner Report**

Blum informed the committee that June data for the preliminary test has been released which she would like shared with the committee rather than sharing the May data. New assignment: Blum would like to have the committee, review and make recommendations on the EITC website: [www.irs.gov/eitc](http://www.irs.gov/eitc). She asked for, recommendations on reorganizing the information in an appropriate way and assessing its "user-friendly"-ness. If there is extraneous or obsolete material, flag it.

After discussion about what to examine about the site, it was decided that Karwin will lead the sub-committee that will look at the architecture of the site and the different connections between the pages. Blum stressed to the committee that for this assignment the focus would be best placed on the site's architecture and not on content unless it's really bad or incorrect and such. She noted that the EITC office does not own all of the content of the site (for example some of it is owned by Compliance) and thus she can't change those parts. Blum recommended that substantive comments on a few parts of the website would serve her better than general, sweeping comments about the whole site. The committee should concentrate on the architecture. New links or titles are fine.

Malcolmson appointed Vivona the chair (in absentia) of the sub-committee looking at the content of the website. Based on input from Blum, the committee understands that obvious outdated, irrelevant, or inaccurate content should be noted, but a more thorough review would begin in November.

Blum would like to increase the EITC information and resources for tax professionals next year (after October 2005) and will look to the committee to offer suggestions on how this can be done. Blum reminded the committee that we are making recommendations that are forwarded to those that make decisions (i.e. not everything coming out of the committee will be implemented).

**Decision**

Committee approved comments on the EITC Assistant including corrections from today's meeting. Handelman will finalize these changes.

**Action Items  
Handelman**

- Make revisions and add conclusion to the EITC Assistant.

**Malcolmson**

- Send the final recommendation on the EITC Assistant to David Williams.



**Woo**

- Send out an email to committee members to describe an introductory EITC Package for the new members.
- Work with sub-committee to develop the introductory package.

**Jenkins**

- Email the (latest) June preliminary 2004 Certification Test data to committee.

**Karwin**

- Solicit input from members on EITC website structure and work on drafting proposal.

**Vivona**

- Solicit input from members on EITC site content and work on drafting proposal.

**Full Committee**

- Reply to Karwin, Vivona and Woo on respective issues.



## **Issue Committee (W & I EITC) Meeting Minutes**

*June 16, 2005  
Teleconference*

### **Panel Members in Attendance**

- Robert Broniarczyk, Romeoville, IL
- Gwen Handelman, Fort Lauderdale, FL
- Cheyanna Jaffke, Placentia, CA
- Thomas Karwin, Santa Cruz, CA
- Leslie Malcolmson, Detroit, MI
- Robert Maziarz, Hainesport, NJ
- Jack Morrell, Mandan, ND
- Al Vivona, Sarasota, FL
- Nan Wilson, Overland Park, KS

### **Panel Members Absent**

- Jim Banks, Bozeman, MT
- Elizabeth Brodine Ghoniem, Winchester, MA
- Philip Cimino, Staten Island, NY
- Morgan Edwards, Charlotte, NC
- Joe Reder, Richland, WA
- Charles Wendt, Iola, TX
- Beadsie Woo, Durham, NC

### **Quorum**

Quorum met

### **TAP and IRS Staff in Attendance**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC
- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY
- Robert Mattingly, Policy Analyst, EITC Office Systems Oper., Washington, DC
- Sandra Ramirez, Designated Federal Official, Brooklyn, NY

### **Public Participants**

- Kim Glassman, National Women's Law Center, Washington, DC
- Amy Matsui, National Women's Law Center, Washington, DC
- Gretchen Bowman, Legal Aid Society of Cleveland, Cleveland, OH
- Susan Morgenstern, Legal Aid Society of Cleveland, Cleveland, OH
- Stephanie Sykes, Center on Budget & Policy Priorities, Washington, DC

### **Opening of the Meeting**

Malcolmson opened the meeting at 2:07pm ET, welcomed all members, staff and guests.

### **Approval of Meeting Minutes**

The May 6-7 face to face meeting minutes were forwarded to the July 16th meeting pending edits to the Rural Outreach portion. The Rural Outreach presentation was extremely similar to the suggestions



sent forward to the EITC program in September of 2004 from the Committee. The committee members feel they should be properly credited.

The May 19th meeting minutes were approved by consensus.

### **Review of Prior Meeting Action Items**

#### *Jenkins*

- Write up a cover letter for the EITC Preparer Letter and TIPS for Choosing a Preparer Letter - **completed**
- Forward the finished products to the EITC Office - **completed**

#### *Malcolmson*

- Finalize the cover letter for the EITC Preparer Letter and TIPS for Choosing a Preparer Letter - **completed**

There was an email sent out in regard to developing a package for new EITC members to be distributed at the annual meeting. Although the Communication Committee is working on the annual meeting, a sub-committee will be developed at the July meeting to work on EITC specific issues. Please begin sending your suggestions. At the upcoming annual meeting, there will be full committee meetings and the first committee teleconference will not be deferred until January. It was suggested that the returning members be given preference in issue committees.

### **Program Owner Presentation-Robert Mattingly**

The EITC Assistant is a web based application to assist taxpayers in determining whether they are eligible for the EITC and a possible credit amount. The EITC Assistant was launched in tax year 2004 and can be located at; <http://www.irs.gov/individuals/article/0,,id=130102,00.html> It is available in both English and Spanish and was launched in tax year 2004. There will be active versions of the EITC Assistant for each year that a taxpayer may file an original or amended return. The EITC office is currently in the process of updating it for the 2005 tax season.

The committee was sent a power point presentation both via email as well as snail mail. Mattingly walked the committee through the EITC Assistant using the following scenario:

- Frank Williams is 35 years old. He is married but legally separated. He has been living apart from his wife for the past 7 months in a house that he pays for. He lives with his foster child. Frank currently works at a grocery store. Earlier this year, he spent two months fighting in the war in Iraq. Frank has little knowledge of the EITC and is curious if he qualifies.

The committee walked through the Assistant screen by screen.

- They chose which language they wanted to use - English Version or Versi'on en Espan'ol.
- Should I Apply? - Find out if you are eligible for the EITC by answering a few simple questions and providing basic income information.
- Tips and Guidance for Determining Eligibility – you will need SSN and W2
- Basic Information – SSN, US Citizen/resident alien, investment income and earned income



- Filing Status – choose one that applies or request assistance
- Your Home – provide the cost of keeping up a home
- Filing Method – filing joint or file separately
- Head of Household – paid more than half of the cost of keeping up a home, unmarried or legally separated
- Are You a Qualifying Child? – being claimed by someone else
- Children-Qualifying Children – the three test are relationship, age and residency
- Income Estimate – helps to estimate my total Income and Adjusted Gross Income
- Income Amounts – enter your income in the boxes provided
- Adjustments to Income – enter income such as wages, interest, pensions and alimony paid to you reduced by specific adjustments, IRA deductions as well as alimony paid by you
- Income Results – based on the amounts you input
- Results – based on the information you provided, you may be eligible to claim the EITC and your credit amount could be \$.

### **Action Items**

#### **Blum**

- Email Jenkins the preliminary 2004 Certification Test data for distribution
- Email Jenkins the 2nd interim 2003 EITC Report to Congress
- Email the Booze Allen discussion notes

#### **Jenkins**

- Send hard copies to the committee of the 2003 EITC Report to Congress
- Send 2004 Certification Test data to the Kim Glassman
- Send 2nd interim 2003

**Kim Glassman**, National Women’s Law Center, Washington, DC—thanked committee for allowing her to attend and would like to receive both the 2003 EITC Report to Congress and the 2004 Certification Test data.



**Gretchen Bowman**, Legal Aid Society of Cleveland, Cleveland, OH—thought the presentation was interesting and would also like to receive both the 2003 EITC Report to Congress and the 2004 Certification Test data.

**Round Robin**

All members thought it was a very informative meeting.

Next Meeting Thursday, July 21, 2005 @ 2:00pm ET



## **Issue Committee (W & I EITC) Meeting Minutes**

*May 19, 2005  
Teleconference*

### **Program Owner-EITC Program Office**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC

### **Designated Federal Official**

- Sandra Ramirez, Program Manager, Brooklyn, NY

### **Panel Members in Attendance**

- Jim Banks, Bozeman, MT
- Elizabeth Brodine Ghoniem, Winchester, MA (in part)
- Robert Broniarczyk, Romeoville, IL
- Philip Cimino, Staten Island, NY
- Cheyanna Jaffke, Placentia, CA (in part)
- Thomas Karwin, Santa Cruz, CA
- Leslie Malcolmson, Detroit, MI
- Jack Morrell, Mandan, ND (in part)
- Robert Maziarz, Hainesport, NJ
- Al Vivona, Sarasota, FL
- Charles Wendt, Iola, TX
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC

### **Panel Members Absent**

- Morgan Edwards, Charlotte, NC
- Gwen Handelman, Fort Lauderdale, FL
- Joe Reder, Richland, WA

### **TAP Staff in Attendance**

- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY

### **Other Attendees**

- Lorie Mings, LTA, Kansas City Service Center
- Kim Glassman, National Women's Law Center, Washington, DC
- Roxie Caines, Center on Budget and Policy Priorities, Washington, DC

### **Welcome**

Leslie opened the meeting at 2:04 PM ET welcomed all members and guests.

### **Roll Call**

Quorum Met.





## **Presentations**

### EITC Preparer Letter

Maziarz sent to Committee via email a version with edits incorporated. Copy was approved by consensus with corrections. Maziarz will send a final version to Malcolmson and Jenkins to be forwarded to Program Owner.

### Tips for Choosing a Tax Preparer

Vivona sent to Committee via email a version with edits incorporated. Copy was approved by consensus with corrections. Vivona will send a final version to Malcolmson and Jenkins to be forwarded to Program Owner.

## **Closing/Assessment**

All members expressed their gratitude that the meeting was both short and productive.

## **Next Meeting June 16, 2005 at 2:00 PM ET**

## **Action Items**

### *Jenkins*

- forward both final versions of the EITC Preparer Letter and Tips for Choosing a Tax Preparer to the EITC Office

### *Malcolmson*

- Prepare cover letter for both the final versions of the EITC Preparer Letter and Tips for Choosing a Tax Preparer

### *Maziarz*

- send the final version of the EITC Preparer Letter to Malcolmson and Jenkins to be forwarded to Program Owner

### *Vivona*

- send the final version of the Tips for Choosing a Tax Preparer to Malcolmson and Jenkins to forward to Program Owner.



## **Issue Committee (W & I EITC) Meeting Minutes**

*May 6, 2005  
Face-to-Face Meeting*

### **Program Owner-EITC Program Office**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC

### **Designated Federal Official**

- Sandra Ramirez, Program Manager, Brooklyn, NY

### **Panel Members in Attendance**

- Jim Banks, Bozeman, MT
- Robert Broniarczyk, Romeoville, IL
- Morgan Edwards, Charlotte, NC
- Gwen Handelman, Fort Lauderdale, FL
- Cheyanna Jaffke, Placentia, CA
- Thomas Karwin, Santa Cruz, CA
- Leslie Malcolmson, Detroit, MI
- Jack Morrell, Mandan, ND
- Robert Maziarz, Hainesport, NJ
- Joe Reder, Richland, WA
- Al Vivona, Sarasota, FL
- Charles Wendt, Iola, TX
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC

### **Panel Members Absent**

- Elizabeth Brodine Ghoniem, Winchester, MA
- Philip Cimino, Staten Island, NY

### **TAP Staff in Attendance**

- Bernie Coston, TAP Director, Atlanta, GA
- Susan Gilbert, Senior Program Analyst, Atlanta, GA
- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY

### **Other Attendees**

- Betty Allen, Local Taxpayer Advocate, Atlanta, GA
- David Williams, EITC Director
- Margaret Warren, Director, Product & Partnership Development, Atlanta, GA
- Mike McBride, Chief, Education Institution & Gov't. Partnerships, Atlanta, GA
- Dennis Kidd, Manager, W&I Reporting Compliance, Atlanta, GA



## **Welcome**

Leslie Malcolmson opened the meeting at 8:30am and welcomed all members and guests.

## **Roll Call**

Quorum Met

## **Review of Agenda**

Leslie Malcolmson reviewed the agenda and explained that the meeting will be held in the hotel for tomorrow, Saturday, May 7, 2005.

## **Approval of Meeting Minutes**

April 21, 2005 Meeting minutes were approved by consensus with corrections.

## **Review of Assignments**

### **All Members**

- Complete the EITC Expertise Survey-Pending

### **Jenkins**

- Send out the previous stuffer notice comments-Completed

### **Maziarz**

- Consolidate feedback on the EITC Preparer message-Completed

### **Vivona**

- Consolidate feedback on Tips in Choosing a Tax Preparer-Completed

## **Public Participants**

None.

## **National Office Report-Bernie Coston, TAP Director, Atlanta, GA**

Taxpayer Advocacy Panel recruitment was a success and ended May 1, 2005. There were 400 electronic received. Bernie and the TAP Managers will be meeting in Milwaukee during the week of May 23rd to start the process for selecting the new members

## **EITC Office Report-David Williams, EITC Director, Washington, DC**

EITC is a refundable credit for low-income working taxpayers which was enacted by Congress in 1975. It offset burden of Social Security taxes and gives low-income taxpayers incentive to work. The maximum credit then was \$400, the maximum income to qualify was \$8000 and 6.2 million taxpayers claimed credits of 1.25 billion. In 2004 the maximum credit is \$4,300, the maximum income to qualify is 35,458 and 21 million taxpayers claimed credits of nearly \$38 billion. EITC claimants are:

- Taxpayers with children
- Qualifying children must meet age, residency and relationship tests
- Taxpayers without children may also claim EITC



Characteristics of Taxpayers Claiming the EITC are taxpayers with more than one qualifying child, married, single, or unmarried heads of household. Most EITC claimants use paid tax preparers and file their tax returns electronically. The 1999 Compliance Study indicated that between \$8.5 and \$9.9 billion, or 27 percent to 32 percent, of EITC claims were paid in error.

Since that time, several statutory and administrative changes have been implemented. Those changes may have affected the estimated levels of improper claims. The three most common filing errors are:

- Claiming a child who is not a qualifying child
- Married taxpayers filing as single or head of household
- Income reporting errors

The two major challenges are increasing participation among eligible taxpayers and reduction in the amount of EITC paid in error. Increasing participation by eligible taxpayers has to be done by increasing public education and outreach. EITC Office's commitment is to maximize participation by eligible taxpayers and minimize erroneous claims by ineligible taxpayers.

**Rural Outreach-Margaret Warren, Director, Partnership & Product Development & Mike McBride, Chief, Education Institution & Government Partnership, Atlanta, GA.**

SPEC ON THE "ROAD"-FY 2005 goal is to develop outreach, free or low cost tax return preparation, and financial literacy pilot models that provide these essential services to the SPEC population living in rural America. Places outside urban areas are rural. For this initiative, urban is defined as cities with a population of 50, 000 or more. This includes their surrounding suburbs or urban fringes with a population density of 500 or more people per square mile.

**The targeted areas are:**

- **The Old Plantation Belt**-these are primarily black populations with high poverty levels. States include North Carolina, South Carolina, Georgia, Alabama, Mississippi and Louisiana.
- **Mid-South Delta**-these are the poorest areas of the Mid South Mississippi River Delta area. Primary states are Mississippi, Arkansas and Louisiana. Tennessee, Kentucky, Missouri and Illinois have small areas in this region.
- **Appalachia**-The vast majority of inhabitants in this region are non-Hispanic Whites. Most are in Kentucky, West Virginia, Tennessee and Missouri. Arkansas, Ohio, Oklahoma and Virginia have smaller areas.
- **Indian Country and the Southwest**-This area contains the highest concentration of traditional Hispanic populations. Texas and New contain the largest populations. Smaller populations in the following states are also considered to be part of this region: Colorado, Florida, Georgia, Oklahoma, California and Arizona.
- **Northcentral Montana (Indian Country)**- This 31,000 square mile region (size of North Carolina) with a population of 150,000 is home to 20,000 Native Americans living in cities and on three reservations. Native Americans have a poverty rate of 41%.

The Outreach locations are: Alabama, Mississippi, Michigan, Kentucky, California, Louisiana, Tennessee, North Carolina, Montana, Georgia, Texas and New Mexico. The strategy is to partner with National Rural Funding Congeal (NRFC) to establish pilot outreach, tax prep, and financial literacy



program with Native American Tribes in Montana. Establish pilot VITA site specializing in IDA with Department of Justice (DOJ) Weed & Seed and HHS.



## **Issue Committee (W & I EITC) Meeting Minutes**

*March 17, 2005*  
Teleconference

### **Panel Members In Attendance**

- Jim Banks, Bozeman, MT
- Elizabeth Brodine Ghoniem, Winchester, MA
- Robert Broniarczyk, Romeoville, IL
- Philip Cimino, Staten Island, NY
- Morgan Edwards, Charolette, NC
- Gwen Handelman, Fort Lauderdale, FL
- Cheyanna Jaffke Placentia, CA
- Leslie Malcolmson, Detroit, MI
- Robert Maziarz, Hainesport, NJ
- Jack Morrell, Mandan, ND
- Joe Reder, Richland, WA
- Al Vivona, Sarasota, FL
- Charles Wendt, Iola, TX
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC

### **Members Absent**

- Thomas Karwin, Santa Cruz, CA

### **Quorum**

Quorum met.

### **TAP and IRS Staff In Attendance**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC
- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY
- Hank Kea, Team Leader, Program Evaluation & Support
- Marisa Knispel, Acting DFO/Program Manager, Brooklyn, NY
- Pat Lee, Acting Director, EITC Program Office, Washington, DC
- David Swan, EITC Office Detailee, Atlanta GA

### **Public Participants**

- Veronica Mayhand, General Accounting Office, Atlanta, GA
- Susan Morganstern, Legal Aid Society, Cleveland, OH

### **Opening of the Meeting**

Malcolmson opened the meeting at 2:03 pm EST, welcomed all members, staff and guests.

### **Approval of Meeting Minutes**

January 20, 2005 meeting minutes were approved as amended.



## **Follow-up on Previous Action Items**

### ***Blum***

- Provide Committee with responses to the five EITC Committee recommendations referenced in the November 18, 2005 David Williams letter. **(Forwarded)**
- Send Jenkins EITC marketing materials **(Completed)**

### ***Jenkins***

- Research hotels in Atlanta for May 5th-7th face to face meeting. **(Completed)**
- Resend the original CP 79 **(Completed)**
- Resend the Electronic Press Kit that will be used for HUD Kiosks **(Forwarded)**
- Resend Grassroots Event Schedule **(Completed)**

### ***Williams***

- Provide Committee with a memo on a certification test in rural areas for comment **(Forwarded)**
- Provide Committee with Pre-Certification Survey **(Completed)**

## **EITC Expertise Survey**

Malcolmson is still in the process of working with staff to finalize the survey. Hopefully it will be completed and sent out to all members in the next couple of weeks.

## **Program Owner Presentation**

**Hank Kea, Team Leader, Program Evaluation & Support** went over the EITC Return Preparer Strategy for 2005 and Beyond Power-Point presentation which included the Background and Past Efforts, Lessons Learned from Past Efforts, Due Diligence, Strategy for 2005 and Beyond as well as how TAP can Help. The Return Preparer Program was launched in 1996 led by the Criminal Investigation Division and was mostly compliance oriented. In 1999 the program shifted focus to education and outreach and was led by the Small Business/Self-Employed and the Wage & Investment Divisions. In 2004 the focus balanced between both compliance and outreach. There were due diligence visits which produced a limited analysis of results; these did not target the right preparers. There was limited follow-up to see if education or treatments worked. The Service was unable to determine if efforts produced a change in tax preparer's behavior and the effectiveness of efforts. The majority of paid preparers are conscientious and comply with the law. Some unscrupulous preparers manipulate taxpayers' reported income, expenses and qualifying children to inappropriately obtain or inflate EITC. Due diligence is critical to EITC compliance as are tax preparer's knowledge of and adherence to Due Diligence requirements. To comply, paid preparers must complete Form 8867, the EITC worksheet, know that all of the information used to determine EITC is correct, retain Form 8867 for three years. There is a \$100.00 penalty that will be applied to any preparer who do not comply with Due Diligence efforts. For 2005 the EITC Office has developed a balanced, methodical Return Preparer Strategy. It is a multi-year, research driven strategy that is balanced between compliance and outreach, and supports results-based business decision making, prior to expanding scope of strategy. The goals are to identify the best tools to select potentially non-compliant preparers, apply appropriate treatments to non-compliant preparers, and determine the effect treatments have on the behavior of preparers and their clients. In the cases where there is outright abuse, they will be referred to the Criminal Investigation Division. At this point there have been 500 preparers selected for Due Diligence visits.

TAP can assist The EITC Program Office by:

- Providing feedback on the current Form 8867- response requested by the April meeting.



- Providing feedback on the “Targeted Communication” letter to tax preparers—response requested by the May meeting.
- Providing feedback on the “Tips for Choosing a Tax Preparer”—response requested by May meeting.

Pat Lee thanked the Committee for taking the time to review the Form 8867.

### **Joint Committee Report**

- Monthly Meeting Survey--There was discussion whether the Monthly Meeting Survey should continue, be revised, included in the closing comments and who should get it.

### **Office Report**

Jenkins informed the Committee that she has blocked rooms at the Best Western at the Peachtree’s in Atlanta for the May 5th-7th face to face meeting. The hotel will be providing the meeting rooms and everyone should be receiving an email from Meredith Odom-Russell, Management Assistant requesting their travel preferences.

### **Public Input**

Veronica Mayhand, General Accounting Office, Atlanta, GA—thanked the committee for allowing her to listen in it was very informative and would like to join in again in the future.

### **Closing Assessment**

All Members thought it was a very informative meeting and are ready to begin working. And some members wonder what effect the survey has on the Committee and whether it is needed.

### **Action Items**

#### ***Blum***

- Provide Committee with responses to the 5 EITC Committee recommendations referenced in the November 18, 2004 letter from David Williams

#### ***Jenkins***

- Resend the EITC wording for the HUD Kiosks.
- Forward previous comments on Form 8867 made by the EITC Committee to the full Committee

#### ***Maziarz/Reder***

- Consolidate feedback on the EITC Preparer message

#### ***Vivona***

- Consolidate feedback on the Tips for Choosing a Tax Preparer

#### ***Woo***

- Consolidate feedback on Form 8867

**Next Meeting April 21, 2005 @ 2:00 pm EST**





## **Issue Committee (W & I EITC) Meeting Minutes**

*February 17, 2005*  
Teleconference

### **Panel Members In Attendance**

- Jim Banks, Bozeman, MT
- Robert Broniarczyk, Romeoville, IL
- Philip Cimino, Staten Island, NY
- Gwen Handelman, Fort Lauderdale, FL
- Leslie Malcolmson, Detroit, MI
- Jack Morrell, Mandan, ND
- Joe Reder, Richland, WA
- Al Vivona, Sarasota, FL
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC

### **Members Absent**

- Elizabeth Brodine Ghoniem, Winchester, MA
- Morgan Edwards, Charlotte, NC
- Cheyanna Jaffke Placentia, CA
- Thomas Karwin, Santa Cruz, CA
- Robert Maziarz, Hainesport, NJ
- Charles Wendt, Iola, TX

### **Quorum**

Quorum met.

### **TAP and IRS Staff In Attendance**

- Alisa Blum, Project Manager, EITC Stakeholder Engagement, Washington, DC
- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY
- Sandra Ramirez, DFO/Program Manager, Brooklyn, NY
- David Swan, EITC Office Detailee, Atlanta GA
- David Williams, Director EITC Office, Washington, DC

### **Public Participants**

- Kim Glassman, Women's Law Center, Washington, DC
- Amy Matsui, Women's Law Center, Washington, DC
- Susan Morganstern, Legal Aid Society, Cleveland, OH

### **Opening of the Meeting**

Malcolmson opened the meeting at 2:03 pm EST, welcomed all members, staff and guests.

### **Approval of Meeting Minutes**

January 20, 2005 meeting minutes were approved as amended.



### **Program Owner Presentation**

#### ***Hartford County Certification Test***

David Williams, Director EITC Program, informed the Committee that the TY 2005 Earned Income Tax Credit Certification Test in Hartford is just beginning. Many of the taxpayers who are in the test have not yet filed their tax returns or have just filed their tax returns. Results will be forthcoming. At this point there are no dramatic differences in Hartford County versus taxpayers who are in other parts of the country in terms of phone calls, letters, or filing patterns. Approximately the same number of taxpayers has tried to certify as the prior year by telephone or regular mail. There are many months to go before there will be any pertinent results. If certification were to become a feature of the EITC, the return on investment would need to include costs, dollars protected, dollars that should have been given but weren't (which isn't typically part of most ROI analyses).

There will be more definitive conclusions on the TY 2003 in two phases: There will be an interim report to Congress of the TY 2003 test sometime in March. It will capture data around what happened without drawing conclusions. For example: how many people answered a particular question in a particular way; how much did it cost them to file their returns and was it a burden? It will not include how many people did not certify or how many people did not certify successfully or did not claim the credit which they qualified for. The final report for the TY 2003 will be completed in June 2005. A copy will be provided to the Committee.

The EITC Program worked with an independent contractor and developed a survey that will be ask about the taxpayer's understanding of the tax return filing process, state of mind when filing, burden, and attitude. It will also try to get at the number of eligible taxpayers that were discouraged from filing. Williams will forward a copy of the survey to the committee. The program has two goals: reducing errors and maximizing participation. Therefore any procedure set for to reducing errors must also increase participation.

There are numerous taxpayers who do not file a tax return because they are afraid of the government and may be eligible. There also may be grandparents who do not realize they are eligible for the credit. Efforts are being made to validate all certifications submitted. In the 2003 test, the filing status of a taxpayer that successfully certified for EITC was almost always accepted. Auditors were told to focus on certification.

Questions that have come up with pre-certification: Do taxpayers need help with certification? Are preparers available to do so and at what cost?

Williams is interested in receiving feedback from the Committee on the idea of testing in rural areas. Williams will be forwarding a memo to Staff for the Committee to comment on.

### **Joint Committee Report**

None.

### **Office Report**

Jenkins informed the Committee that after conducting the cost comparison of Chicago, Atlanta and Las Vegas for the May face to face meeting, Atlanta seems to be the most cost effective. Jenkins will research hotels in Atlanta and report in the March 17th meeting.

### **Self Introduction of New Program Owner**

Alisa Blum, Project Manager, EITC Stakeholder Engagement has been temporarily assigned to replace Kay Farrow who has recently retired. Alisa gave a brief description of her Internal Revenue Service experience. She also expressed her delight with being assigned to the Committee.

David Swan, EITC Office Detailee has also been temporarily assigned to assist Alisa for the next 6 weeks.



## **Review of Prior Meeting Action Items Committee Members**

- Respond to email requesting volunteers to the new Communication Committee **(completed)**

### **Malcolmson**

- Email a Survey to the full Committee on EITC expertise level **(to come in March)**

### **Farrow**

- Provide Committee with original CP 79 to compare **(completed)**
- Forward Jenkins the Electronic Press Kit that will be used for HUD Kiosks **(completed)**
- Send Jenkins the Grassroots Event Schedule **(completed)**
- Recommendation Responses **(forwarded for Alisa Blum)**

### **Public Input**

Susan Morganstern, Legal Aid Society, Cleveland, OH asked whether letters requesting certification in Hartford are sent in languages other than English. David Williams responded that taxpayers may request letters in Spanish.

### **New Action Items**

#### ***Blum***

- Provide Committee with responses to the five EITC Committee recommendations referenced in the November 18, 2005 David Williams letter.
- Send Jenkins EITC marketing materials

#### ***Jenkins***

- Research hotels in Atlanta for May 5th-7th face to face meeting.
- Resend the original CP 79
- Resend the Electronic Press Kit that will be used for HUD Kiosks
- Resend Grassroots Event Schedule

#### ***Williams***

- Provide Committee with a memo on a certification test in rural areas for comment
- Provide Committee with pre-certification survey

### **Closing Assessment**

All Members thought it was a very informative meeting.

**Next Meeting March 17, 2005 @ 2:00 pm EST**



## **Issue Committee (W & I EITC) Meeting Minutes**

*January 20, 2005*  
Teleconference

### **Panel Members In Attendance**

- Maureen Amos, Chicago, IL
- Jim Banks, Bozeman, MT
- Adrienne Bell-Stampley, Calumet City, IL
- Elizabeth Brodine-Ghoniem, Winchester, MA
- Robert Broniarczyk, Romeoville, IL
- Philip Cimino, Staten Island, NY
- Morgan Edwards, Charlotte, NC
- Gwen Handelman, Fort Lauderdale, FL
- Cheyanna Jaffke, Placentia, CA
- Thomas Karwin, Santa Cruz, CA
- Leslie Malcolmson, Detroit, MI
- William Matheny, Long Beach, MS
- Bob Maziarz, Hainesport, NJ
- Jack Morrell, Mandan, ND
- Joe Reder, Richland, WA
- Al Vivona, Sarsota, FL
- Nan Wilson, Overland Park, KS
- Beadsie Woo, Durham, NC

### **Members Absent**

- Harvey Epstein, Lee, NH
- Christine Hurley, Fairfax, VA
- Charles Wendt, Iola, TX

### **TAP Staff and IRS Staff In Attendance**

- Audrey Y. Jenkins, TAP Program Analyst, Brooklyn, NY
- Sandy McQuin, DFO/Program Manager, Milwaukee, WI
- Kay Farrow, EITC Senior Policy Analyst, Atlanta, GA

### **Public Participants**

None.

### **Opening of the Meeting**

Malcolmson opened the meeting at 2:10 pm EST, welcomed all members and reviewed the agenda. Malcolmson reminded the Committee to follow the Conference Call Guidelines, stating your name prior to speaking and placing your telephone on mute to minimize noise.

### **Joint Committee Report**

Malcolmson informed the Committee that there will only be one Face to Face meeting this year per Committee. The committee needs to decide on location and date. Discussions to come later in the meeting under Administrative Issues.



TAP has realized the Committees are too large. Therefore, there has been a new Committee developed which will be called the Communication Committee. The new committee will be geographically balanced. The expectation is that the size of all Issue Committees will be reduced.

Malcolmson reviewed the informational items that were sent via snail mail to the committee. This package was sent out to share past activities and accomplishments of the EITC Committee. She also directed members to the [www.improveirs.org](http://www.improveirs.org) website to review additional Committee accomplishments.

### **Program Owner Report**

#### **EITC Screen shots (EITC Assistant and EITC Cert)**

The EITC Assistant will help taxpayers determine if they are eligible for EITC. EITC Cert will allow taxpayers selected to pre-certify for the EITC to check that status of their EITC claim. Both applications have been completed and there is no additional input needed. All previous comments were welcomed and some were built into the programs and they have already been launched this January and are available at [www.irs.gov/EITC](http://www.irs.gov/EITC). The EITC Cert however, had some minor problems with recognizing both some of the 25,000 previous and 25,000 current taxpayer's information and is currently under construction and will be up and running shortly.

#### **Bill H.R. 1528 (Proposal that tax practitioners are required to register in order to do federal tax returns)**

Still outstanding proposed legislation. If passed, David Williams, Director, EITC Program may be interested in this Committee working on this issue.

#### **Certification 2005 Process initiative in Hartford Update**

David Williams will be present at the February meeting to make the presentation at that time.

#### **HUD/IRS Partnership**

The EITC Program Office has entered into an inter-agency agreement with HUD which involves placing EITC information on HUD Kiosks that are located nationwide. Expected to go live in February.

#### **2005 Marketing Campaign**

There has been an Email blast sent to preparers promoting the new EITC Assistant.

There will be public service announcements for radio, outdoor, and newspapers in both in English and Spanish.

Paid advertising will be in both English and Spanish. The cities scheduled are New York, Miami, Los Angeles, Chicago, and Houston.

Hispanic grassroots events will be in key markets of Miami, Los Angeles, Chicago and Houston.

There is an Electronic Toolkit for Preparers that this Committee has provided comments on which is located at [www.irs.gov](http://www.irs.gov).

#### **Quorum Requirements**

By consensus quorum will be **50%** of the entire Committee plus one rounding down.

#### **Administrative Issues**

Due to the budget, Committees will only be allowed one FTF (Face to Face) meeting. Jenkins will do a cost comparison on Atlanta, Chicago and Las Vegas and report back in the February 17, 2005 meeting.



### **Survey of Members**

Malcolmson will be forwarding the Committee a survey to determine the EITC expertise of each member.

### **Closing Comments**

Everyone expressed their delight with the information shared and the meeting in general.

### **Action Items**

#### **Committee Members**

- Respond to email requesting volunteers to the new Communication Committee.

#### **Malcolmson**

- Email a Survey on EITC expertise level

#### **Farrow**

- Provide Committee with original CP 79 to compare.
- Forward Jenkins the Electronic Press Kit that will be used for HUD Kiosks
- Send Jenkins the Grassroots Event Schedule
- Recommendation Response