

2012 Meeting Minutes Face to Face Service Methods

- November 13, 2012
 - October 9, 2012
 - September 11, 2012
 - August 14, 2012
 - July 10, 2012
 - June 7 – 8, 2012
 - May 8, 2012
 - March 13, 2012
 - February 14, 2012
 - January 10, 2012
-

Taxpayer Advocacy Panel (TAP) Face to Face Service Methods Project Committee Meeting Minutes November 13, 2012

Designated Federal Official (DFO)

- Curran, Dorry

Members Present

- Cain, David
- Baldwin, Barbara
- Smith, Toni
- Janci, Gerald

Members Absent

- Akbar, Sandra
- Patton, Susan
- Sykes, Edward
- Fitzgerald, Annette
- Powers, Clarke
- Silva, Michael

Staff Present – TAP/TAS

- Babb, Rose A. – Management Assistant
- Boyd, Laura – Program Analyst
- Mezger, Bill – TAS Portfolio Manager
- Morizio, Louis – Program Manager
- Powers, Donna – Program Analyst
- Tiffany Todaro – Acting TAP Director

Program Owners

- D'eredita, Tina – W&I
- Albee, Amy – Supervisor, Tax Advisory

Public Participants

- None

Welcome/Announcements

Curran welcomed everyone and opened the meeting. Tiffany Todaro, Acting TAP Director welcomed everyone and thanked each of the panel members for their service to the TAP and to this committee. She also recognized the retiring members: David Cain and Sandra Akbar.

Approval of Minutes

The minutes for October were not approved because the meeting did not have quorum. They will be sent to the panel members via email by Powers for approval.

Program Owners

D'eredita did not have anything new to report however, she stated W & I had not yet received the TAC referral for their review and analysis. She thanked the committee for the work they had completed and acknowledged the good product she felt came out of the many months of discussions.

TAP Manager

Morizio welcomed everyone and said the following:

- TAP's Face to Face meetings are official, December 3 – 7.
- The TAC and Toll Free Project Committee meetings will take place in Plantation, FL therefore, the Plantation Office analysts do not have to travel.
- Communications Project Committee meeting will take place in Oakland, CA, and TFP and Notices will take place in Jacksonville, FL.

Morizio also thanked the panel and his staff for the hard work, dedication, and great report that came from the TAC this year.

Joint Committee Recommendation Discussion on the following:

Powers reported all the corrections from the Joint Committee were made and the report was forwarded to IRS.

Outreach Report

The Vice-Chair was not present on the call, so there was no Outreach Report.

Public Participation



There were no members of the public on the teleconference.

Closing

The next meeting is scheduled for Plantation, FL on December 5, 2012.



**Taxpayer Advocacy Panel (TAP)
Face to Face Service Methods Project Committee
Meeting Minutes
October 9, 2012**

Designated Federal Official (DFO)

- Curran, Dorry

Members Present

- Baldwin, Barbara
- Fitzgerald, Annette
- Powers, Clarke
- Silva, Michael
- Smith, Toni

Members Absent

- Akbar, Sandra
- Cain, David
- Janci, Gerald
- Patton, Susan
- Sykes, Edward

Staff Present – TAP/TAS

- Albee, Amy – Supervisor, Tax Advisory
- Babb, Rose A. – Management Assistant
- Boyd, Laura – Program Analyst
- Dominguez, Marianne – Program Analyst
- Morizio, Louis – Program Manager

Program Owners

- D'eredita, Tina – W&I

Public Participants

None

Welcome/Announcements

Curran welcomed everyone, and stated that she did not have anything new to report.

Approval of Minutes

The minutes for September were approved by the full committee.

Program Owners

D'eredita did not have anything new to report however, she stated that regarding the TIGTA Audit Report proposal, there were no new developments subsequent to the last teleconference call update on September 11.



TAP Manager

Morizio welcomed everyone and said the following:

- TAP's Face to Face meetings are official, December 3 – 7.
- The TAC and Toll Free Project Committee meetings will take place in Plantation, FL therefore, the Plantation Office analysts do not have to travel.
- Communications Project Committee meeting will take place in Oakland, CA, and TFP and Notices will take place in Jacksonville, FL.
- Program Owners are expected to attend both meetings in Plantation, FL., and Oakland, CA. Due to budget constraints, DFOs/LTA (Designated Federal Officials and Local Taxpayer Advocates) will no longer provide assistance to TAP Project Committees. The program managers of each committee will be handling those responsibilities previously handled by DFOs/LTAs beginning 2013.

Joint Committee Recommendation Discussion

Issue 23112 – IRS and Utah Working Together

Issue 23553 – Face to Face Non Technology

Issue 23554 – Face to Face Technology

Morizio informed members that the recommendations from the committee were submitted to the Quality Review Team. Once we get the comments back from Russ Pool, Database Analyst, Donna will subsequently send the recommendations to committee members Clarke Powers and Baldwin for distribution to the full committee. The recommendations made by the Quality Review Team, do not have to be final; the committee can elect to keep their original format. Any changes to the recommendations are left up to the author and chair of the full committee to adapt if they choose.

Outreach Report

Fitzgerald stated the following:

- Identify and listen to issues of taxpayers, this will provide opportunities for good outreach. Fitzgerald also acknowledged that her committee has not done a significant amount of outreach activities for 2012, but expects that this will turn around in 2013.
- There were 6 outreach activities for September with an audience of 37 – no issues were submitted from those outreaches.
- The face to face meeting will be holding training sessions for all members on outreach activities.



Public Participation

There were no members of the public on the teleconference.

Closing

Fitzgerald and Curran thanked the members for joining the teleconference call.

The next teleconference is scheduled for Tuesday, November 13, 2012 at 2 p.m. ET.

These minutes were approved by the full committee on November 19, 2012.



**Taxpayer Advocacy Panel (TAP)
Face to Face Service Methods Project Committee
Meeting Minutes
September 11, 2012**

Designated Federal Official (DFO)

- Curran, Dorry

Members Present

- Cain, David
- Fitzgerald, Annette
- Janci, Gerald
- Powers, Clarke
- Smith, Toni
- Sykes, Edward

Members Absent

- Akbar, Sandra
- Baldwin, Barbara
- Patton, Susan
- Silva, Michael

Staff Present – TAP/TAS

- Babb, Rose A. – Management Assistant
- Fields, Anita – TAP Analyst
- Mezger, Bill – TAS Portfolio Manager
- Powers, Donna – TAP Analyst

Program Owners

- Braddock, Beth – W&I Program Owner
- D'eredita, Tina – W&I Program Owner

Public Participants

- None

Welcome/Announcements

Curran welcomed everyone to the teleconference, and told them she did not have anything new to report for this teleconference meeting.

Morizio welcomed everyone as well and said the following:

- TAP's first and second year members are asked to return their Tax Check Waiver forms to Linda Rivera in National Office, Washington, DC. If members

have filed their taxes jointly, they should secure their spouses' signature before returning the forms.

- Members should mark their calendar for TAP's Annual Face to Face meeting the week of December 3 – 7. Three locations have been tentatively identified for these meetings, Plantation, FL, Jacksonville, FL and Seattle, WA. There are two groups visiting each city; the first group of members will be arriving on Monday, December 3 through December 5 and the second group will arrive Wednesday, December 5 through Friday, December 7. Morizio informed members that the details are now being worked out and will have an update for members at the next teleconference in October.
- For 2013, five project committees have been identified for TAP members to work- Notices, Taxpayer Assistance Center, Toll Free, Tax Forms and Publications and Communications. The Communications Project Committee will include SBSE.

Nominations are now being accepted for TAP Chair and Vice Chair leadership positions for 2013. Members are encouraged to submit their names for those positions. In addition, Morizio mentioned that there will be Project Committee Chair and Vice Chair leadership positions to be filled for the 2013; members are asked to think about those leadership roles as well.

Chair Comments

Cain welcomed everyone to the teleconference. There were no new announcements.

Review of Previous Meeting Minutes

The minutes for August were approved by the full committee for posting.

Program Owners Presentation

D'eredita mentioned that TIGTA's Audit Report highlighted the effectiveness of the TAP members volunteer efforts to expand taxpayers' assistance via the, Face to Face Panel, FTF Report reviewed by TIGTA, D'eredita also stated that the IRS is looking for more ways to gauge success.

Braddock mentioned that TIGTA's report is independent of TAP and that it helps to support TAP's position in the FTF Panel Report.

Powers mentioned that she received the final draft from Baldwin who was not present at today's teleconference Powers will provide the full committee and program owners with a copy of the FTF Panel Report for review; this can be approved by email. The draft copy still has to be approved by the Joint Committee Quality Review Team before going forward to the IRS Program Owners.

Outreach Report

- Fitzgerald mentioned that she has two outreach activities coming up this Friday. She also asked members to think about performing outreach via media outlets.
- Powers mentioned that she did an outreach at a hospital facility, and spoke to 8 taxpayers.
- Morizio mentioned that there are multiple sources to reach out to the public for Outreach activities- Local Congressman Offices, School PTAs, Libraries, Churches, Business Organizations, Knights of Columbus, Facebook, and Twitter.
- Fields gave the outreach numbers for the committee for August – there were 7 outreaches with an audience of 36 and one issue that came to TAP. Members were asked to continue to send in outreach monthly reports even if there were no outreaches just to inform the staff about hours spent working on all TAP activities.

Public Participation

There were no members of the public on the teleconference.

Closing

Curran thanked the members for their efforts on their projects.

Cain thanked everyone for joining the teleconference call.

The next teleconference is scheduled for Tuesday, October 9, 2012 at 2 p.m. ET.

These minutes were approved by the full committee on October 9, 2012.



**Taxpayer Advocacy Panel (TAP)
Face-to-Face Service Methods Project Committee
Meeting Minutes
August 14, 2012**

Designated Federal Official (DFO)

- Dorry Curran

Members Present

- Barbara Baldwin
- David Cain
- Annette Fitzgerald
- Gerald Janci
- Toni Smith
- Edward Sykes

Members Absent

- Sandra Akbar
- Susan Patton
- Michael Silva

Staff

- Rose A. Babb – Management Assistant
- Anita Fields – TAP Analyst
- Donna Powers – TAP Analyst
- Beth Braddock – Program Owner

Welcome/Announcements

Curran welcomed everyone to the teleconference. There were no new announcements.

Review of Previous Meeting Minutes

The full committee approved the minutes for July for posting.

Program Owners Presentation

Braddock stated that she did not have anything to report for this teleconference meeting.

Boyd stated that the focus on the Most Serious Problems, MSP has shifted from “schedules in advance appointments” **to** “serving customers on a first come first serve basis”. This will be mentioned in the MSP Report but will **not** be the focus of the MSPs. The focus on the MSP will be how TAC offices operated going as far back as 8 years ago. Braddock mentioned that despite technology, there will be some taxpayers that need to have direct contact with IRS employees. Braddock’s office will look at what worked well and what did not; those services that worked well for taxpayers will be incorporated with some technology to improve TAC services.

Subcommittees – Donna Powers

Powers reviewed the two Alternative Face to Face service Projects with members:

- Issue 23553: Exploring alternative methods utilizing non-Technology based methods.
- Issue 23554: Exploring alternative options utilizing technology-based methods.

Powers asked the project committee members to review the projects and make any revisions/comments to the content. Subsequent to those revisions, there will be a Subcommittee meeting on September 4 at 2:00 p.m. EST. Revisions/comments on those projects should be returned to Baldwin and Powers by August 22.

Outreach Report

- Baldwin mentioned that she spoke to 12 people mostly informally.
- Powers mentioned that she had 3 events, but did not gather any issues.
- Sykes mentioned that he would speak to his congressman on placing the VDS information in rural areas. He also mentioned that he had some contact with taxpayers.
- DFO Curran mentioned that she attended a Small Business event; she talked about TAP.

Public Participation

There were no members of the public on the teleconference.

Closing

Fitzgerald thanked Baldwin and Clarke for their assistance on the technology projects.

Action Item: Powers will send a calendar for the September 4 Subcommittee call.

Cain thanked everyone for joining the teleconference call.



**Taxpayer Advocacy Panel (TAP)
Face-to-Face Service Methods Project Committee
Meeting Minutes
July 10, 2012**

Designated Federal Official (DFO)

- Dorry Curran, DFO – Absent
- Marisa Knispel – Acting DFO

Attendance

- Sandra Akbar
- Barbara Baldwin
- David Cain
- Gerald Janci
- Toni Smith
- Edward Sykes

Members Absent

- Susan Patton
- Michael Silva
- Annette Fitzgerald
- Clarke Powers
- Winifred Browne – Resigned

Staff Present- TAP/TAS

- Donna Powers – TAP Analyst
- Bill Metzger – Supervisory Associate Advocate

Program Owners

- Donny Vester
- Beth Braddock

Welcome/Announcements

Knispel acted as the DFO, she welcomed everyone to the teleconference.

Chair Comments

Cain welcomed everyone to the teleconference. Powers informed members that Browne has resigned from the TAP; she will not be replaced until 2013.

Review of Previous Meeting Minutes

The June minutes were approved for posting by the full committee.

Program Owners Presentation

The program owners did not have anything to report.

Mezger informed the members that the testing of the Virtual Delivery System (VDS) has been completed. He mentioned that the IRS considered the VDS very successful and will expand it in 19 locations around the country. Ten sites in the TAC will be used and two in partner sites. The sites were tested for quality, and were found to be equal to or exceeded the quality from taxpayers that visited IRS offices. Overall, Mezger stated the taxpayers are happy; the technology is working very well.

Sykes mentioned that he would speak to his congressman on placing the VDS information in rural areas. Braddock mentioned that Sykes' idea is good, but that she would prefer this process to go through her office.

Subcommittees (Non-Technology and Technology)

Powers suggested that rather than list specific locations to place the machines, the (2) subcommittees discuss and create a list of public locations to place kiosk machines. An example given was at post offices in some key areas that taxpayers can access.

Baldwin proposed having a unified outline from both subcommittees. Powers suggested having a joint call/full committee call to discuss "overlapping of assignments" - recommendations and conclusions.

Outreach Report

There were no outreach reports.

Input from the Public

There were no members of the public on the teleconference.

Suggestions for Annual Meeting Virtual Workshop (AMVW)

Powers asked members what topics they would like to see on the AMVW. Some of the suggestions were:

- New enhancements that other member have used and worked well.
- Various ways to channel issues to the Joint Committee and, the IRS.
- There should be a flow chart issue process.
- Members should have access to our database to be aware of issue status.

Closing

Knispel and Cain thanked everyone for joining the teleconference.



**Taxpayer Advocacy Panel (TAP)
Face-to-Face Service Methods Project Committee
June 7-8, 2012**

Designated Federal Official (DFO)

- Dorry Curran, DFO

Members

- Ed Sykes
- Barbara Baldwin
- Sandra Akbar
- Michael Silva
- Clarke Powers
- David Cain, Chair
- Annette FitzGerald, Vice Chair
- Toni Smith

Members Absent

- Gerald Janci
- Sue Patton
- Winifred Browne

Staff

- Anita Fields, TAP Analyst/note taker
- Donna Powers, TAP Analyst
- Louis Morizio, TAP Manager
- Laura Boyd, Systemic Advocacy Analyst
- Deb'orah Momon-Townsend, Management & Program Analyst, W&I
- Tina D'eredita, Program Manager, W&I, FA
- Beth Braddock, Policy Analyst, W&I, FA
- Donny Vester, Supervisory Management and Program Analyst, W&I, FA

Welcome and Roll Call/Quorum

David Cain welcomed everyone to the meeting. Quorum was met. The members went around the room and introduced themselves.

Approval of Meeting Minutes

Minutes for March, April, and May were approved by consensus. There were two corrections to be made to the May 8 meeting. First change: quorum was met. Second change: page 2 under subcommittee reports as read, **“Technology – Clarke Powers stated the manager shared the Kiosk and the IVT.** Should read, **“Technology – Clarke Powers stated the manager showed the Kiosk and the IVT.**

National Office Report

Louis Morizio informed the committee that we are now in the interview phase of recruitment. Tiffany Todaro is the acting TAP Director for the next ninety days. The Joint Committee meeting is scheduled for July in Indianapolis and the agenda is full. Morizio discussed the annual meeting and the possibility of virtual training. He emphasized that **all travel** must be made through the TAP staff because if you do not, you will not be reimbursed correctly.

DFO Team Building

Dorry Curran explained the role of the DFO. She told the panel members that the IRS and the panel members are trying to attain the same goal. She also stated that in her role, she is responsible for assisting with research, keeping meetings on track, and making sure that the interest of the IRS is protected.

The committee completed a team building exercise where they learned how each of their personalities work to have a successful working relationship as a member of TAP.

Issue/Survey Results

Donna Powers gave an overview of the TAC survey results. She stated that the committee has two subcommittees, Technology and Non-Technology, but as a result of the survey, the committee will be possibly looking at customer service and physical layouts of the TACs.

Questions the survey asked

- Why did you visit the IRS Walk-in office today?
- Did you try to use another IRS service to resolve your issue before coming to the IRS office today?
- Why did you visit the IRS office today instead of using some other IRS service?
- How long did it take you to get to the IRS Walk-in office today?
- Did you have to take time off work to visit the IRS Walk-in office today?
- Would you be willing to interact with an IRS representative virtually, using a computer screen (similar to Skype), instead of in person?
- Which of these electronic devices would you be willing to use to interact with the IRS
- Was your visit today about—Individual taxes, Business taxes, both, or other?

D'eredita stated that if the IRS publicizes the alternative service methods better than they have done in the past, it will cut down on the lines at the TAC sites.

Toni Smith stated that the reason most people still go into the TACs is because they never receive answers or resolution over the telephone system.

Curran suggested that the IRS letters should have coded letters that assist the Customer Service Representatives (CSRs). Curran also asked if there is a way when information is mailed, a taxpayer can get an immediate response.

Program Owner Reports

Leslye Baronich the Director of Field Assistance called in on the phone to give a brief introduction; Baronich thanked the panel for the work and challenges the panel is doing in addressing field assistance concerns. Baronich explained that during filing season, since the ID theft was so prevalent here in Florida other offices were supportive and sent employees over to help out. Field Assistance has requested additional resources to help out the TAC in Plantation. Baronich reconfirmed that the committee's charge is to find alternative methods for taxpayers to get the help they need without going into the TAC centers, but if taxpayers do have to come in, then find ways give them the service they need efficiently and effectively.

Beth Braddock gave an overview of Field Assistance. Braddock described the structure and talked about TAC, Field Assistance Key Services, How many taxpayers they serve and the staffing, their Significant Accomplishments, FA Technology Portfolio, and where kiosks are located.

- What is a TAC? It is where they meet with the customers, they are staffed with anywhere from 1-23 employees. There are 398 TACs across the country and most are open 5 days per week, excluding holidays.
- Field Assistance Key Services: Respond to inquiries and adjustments to tax accounts, accepting payments and making payment plans, providing limited need based courtesy return preparation, and answering tax law questions pertaining to individual federal tax returns.
- How many taxpayers are served and the staffing: customers for total TAC contacts in 2011 is 6,387,086, employees for FY 2011 is permanent 2,004, temp 312. FY 2012 for TAC contacts is 4.1 million. Permanent employees 1,836 and Temp 276.
- FA (FY 2012) Significant Accomplishments—Delivered a successful 2012 filling season serving over 2.77 million taxpayers, achieved continued success with quality through the month of April (85% in accuracy of Tax Law Contacts against goal of 83%, 92% in accuracy of Accounts Contacts against a goal of 91%, and 89% in accuracy of Return Preparation).

Vester mentioned that the TACs are moving toward an automated system that will gate taxpayers to the assistor that can assist them with their issues. (Technology)

Systemic Advocacy (SA) Report

Laura Boyd gave a brief overview of the office of SA. The office of SA analyzes issues to try and find the root cause. She also shared that if an issue comes into her realm, SA will contact an LTA in TAS and a TAP manager to see if someone else is working on the same or a similar issue to see if information can be shared and worked together. She also shared the SA organizational structure. SA has technical liaisons that report directly to Executive Director of Systemic Advocacy (EDSA) as Subject Matter Experts (SME) in statutory authority and guidance in their respective functional areas. The areas are: Campus, Collection and Examinations.

SA roles and responsibilities:

- SA directors and analysts work with division and executives and senior IRS management to review policies and procedures and recommend improvements. The solutions may be systemic changes or legislative remedies.
- SA analyzes trends, manages projects and portfolios, manages TAP issues and projects, tracks IMD reviews, and task forces.
- SA also works Common Issue Dispositions, identifies appropriate Issues and advocacy projects (these are systemic problems that do not pose a hardship).
- SA success stories include: Notifying taxpayers of approved Installment Agreements, Reasonable Cause Assistant (RCA), and Theft of Decedent SSNs.
- Boyd discussed a little about the Annual Report to Congress (ARC). She explained where the NTA gets the issues that is reported and how the team develops the issues.

Subcommittee Breakouts

The Face-to-Face Service Methods Project Committee is comprised of two subcommittees. They are technology and non-technology. These two subcommittees have 5 members each. The breakouts allowed the subcommittee members to work on their issues and begin preparing a referral for the recommendation to the IRS.

June 8, 2012

Welcome

David Cain opened the meeting and welcomed everyone back.

Taxpayer Assistance Center Tour

The committee took a tour of the local TAC office in Plantation, FL. Although all TACs operate differently, the manager walked them through how the office in Plantation runs. They were informed that some days they have to cut off the number of taxpayers they have in line waiting because they won't be able to get to them before the office closes. The TAC manager shared the number one reason taxpayers' visit the center is Identity Theft, followed by Transcript requests. The panel thought the tour was insightful and they were appreciative of the time allotted to give them the tour.

Outreach Report

Anita Fields gave the outreach report for the month of May and she also gave a brief overview on how to correctly complete the outreach and hours reporting form. Annette Fitzgerald discussed the various outreaches being conducted in the committee and gave examples of other types of outreaches the committee may utilize.

Miami Low Income Tax Clinic

Alphonse Picard, TAP Alternate from Miami, gave a brief description and overview of the Miami Low Income Tax Clinic and what he does for outreach in his community. He shared that he deals with a small population in Miami-Dade County, a community named Little Haiti. He runs a center called Sant La, which assists low-income families with completing their taxes. They also educate the families about taxes, so that they are more comfortable to file, as well as current issues, such as identity theft.

Subcommittee Breakout Reports

Non-Technology proposed solutions

- Virtual Service Delivery (VSD) and Fully Self Assisted (FSA) kiosks in more locations
- Payment kiosks
- Ability to make appointments at the TAC and mobile site
- Using the U.S. Post Office, LITCs, National Guard Armory, Social Security offices, and Education Extension Offices as a hub to place some VSDs and FSA kiosks
- Key words placed in notices to help the taxpayer get to the correct CSR.
- Place a QR code on a notice to get them directly to who they need to assist them.
- Advertise alternative options more efficiently

Things that the IRS already tried or is working on beginning

- Having an express line for those taxpayers that only have a payment or need a form
- Placing an automated ticketing system that automatically gate taxpayers to an assistor that can assist them
- Use mobile vans again and having them at location for a longer period and make taxpayers more aware
- Return Preparation Appointment System where you can make an appointment online and the system can tell you where to go. This wasn't continued due to cost, but panel members want to recommend doing it again.

Technology proposed solutions

- VSD and FSA Kiosks
- Payment kiosks in TACs as well as other locations
- War Room for Virtual Access

Input from the Public

None

Closing

In closing, the panel went around and gave a brief thought on how the meeting went. Ed Sykes and Clarke Powers expressed frustration at not having a face-to-face meeting in December, especially for the new people. Others in the group expressed the same feelings, but thought if the face-to-face meeting was held earlier, it might help.



**Taxpayer Advocacy Panel (TAP)
Face to Face Service Methods Project Committee
Meeting Minutes
May 8, 2012**

Designated Federal Official (DFO)

- Dorry Curran, DFO (Absent)

Members Present

- Baldwin, Barbara
- Fitzgerald, Annette
- Powers, Clarke
- Silva, Michael
- Smith, Toni
- Sykes, Edward

Members Absent

- Akbar, Sandra
- Cain, David
- Browne, Winifred
- Janci, Gerald
- Patton, Susan

Staff Present

- Fields, Anita – TAP Analyst
- Jenkins, Audrey – Acting TAP Manager
- Gold, Annie – Secretary
- Powers, Donna –TAP Analyst

Public Participants

- Boyd, Laura – TAS Systemic Advocacy Analyst
- Braddock, Beth – W & I Program Owner
- D'eredita, Tina – W&I Program Owner
- Mezger, Bill – TAS Portfolio Manager
- Momon-Townsend, Deborah – W&I Program Owner

Welcome/Announcements

Annette FitzGerald stated quorum was not met, so no voting will take place.

Roll Call

Quorum not met.

DFO Report

Donna Powers welcomed everyone. The TAP/TAC survey was completed and the data is being analyzed by TAS Research and Analysis.



Members from the Public

None

Review of Previous Meeting Minutes

No

Survey Discussion

Donna Powers stated Acting Manager Susan Gilbert is on leave. The Survey was sent out to everyone. All comments will be addressed including any blank spaces and added comments. Some of the comments are now issues. They will be rolled up and placed in the Database. They will be shared with each member at the Face-to-Face meeting in June to work. There will be a printed report to go through each one of the issues. There was one hindrance where the Hispanics had interpreters with them and they did not want to comment back and forth.

Program Owners

Tina D'eredita put together an analysis from the surveys to be discussed at the face-to-face meeting. Beth Braddock will send it to Powers.

Toni Smith added there are a limited number of returns completed per day. Braddock indicated this has been changed to do unlimited all day.

Sub-Committee Reports

Non-Technology: Edward Sykes – stated the subcommittee's monthly meeting was held last week. They will be having an additional meeting on May 30 for more discussion.

Technology: Clarke Powers – stated the manager demonstrated the Kiosk and the IVT.

Donna Powers has been assigned to the National Taxpayer Advocate's (NTA) Annual Report To Congress (ARC), Most Serious Problems (MSP) task team along with Laura Boyd. The MSP they are working on are the TACs, which is perfect for this committee.

Face-to-Face Meeting

The committee will be staying at the:

Hampton Inn – Ft Lauderdale/Plantation 7801 S. W. 6thth Street (954) 382-4500

The dress is business casual. The travel dates is June 6. The committee will work all day June 7 and a half day on June 8. The travel home date will be in the afternoon on June 8.

Donna Powers encouraged participation in a group dinner. The final decision will be made during the Face-to-Face meeting.

Public Participation

None



Closing

Audrey Jenkins expressed thanks to everyone on behalf of Louis Morizio. The staff is looking forward to seeing everyone at the Face-to-Face meeting.

The next meeting scheduled is a teleconference July 10, 2012 at 2:00 p.m. ET. These minutes were approved by the full committee on June 7, 2012.



**Taxpayer Advocacy Panel (TAP)
Face to Face Service Methods Project Committee
Meeting Minutes
March 13, 2012**

Designated Federal Official (DFO)

- Dorry Curran, DFO

Members Present

- Akbar, Sandra
- Baldwin, Barbara
- Cain, David
- Fitzgerald, Annette
- Patton, Susan
- Powers, Clarke
- Silva, Michael
- Smith, Toni
- Sykes, Edward
- Browne, Winifred

Members Absent

- Janci, Gerald

Staff Present

- Berkey, Steve – Sr. TAP Analyst
- Fields, Anita – TAP Analyst
- Gilbert, Susan – Sr. TAP Analyst
- Gold, Annie – Secretary
- Morizio, Louis – Program Manager
- Powers, Donna –TAP Analyst

Public Participants

- Braddock, Beth – W & I Program Owner
- Boyd, Laura –TAS SA Analyst
- D'eredita, Tina – W&I Program Owner
- Espinoza, Manuel – TAP Alternate
- Mezger, Bill – TAS Portfolio Manager
- Momon-Townsend, Deborah – W&I Program Owner
- Roberts, Bridget – Deputy Executive Director Systemic Advocacy
- Hatch, Carol – TAS Research Program Analyst

Welcome/Announcements

David Cain welcomed everyone to the teleconference. He shared an overview of the agenda items to be covered.

Review of Previous Meeting Minutes

The February minutes were approved by the full committee for posting.

Program Owners

No comments to add at this time.

Sub Committee Reports

Non-Technology Subcommittee

Edward Sykes – the subcommittee met and discussed a list of possible discussion topics provided by Clarke Powers. The biggest obstacles to overcome are the resources on the non-technology side, such as financial and adequate staffing. One issue discussed was losing VITA volunteers. Tina D'eredita discussed the background information she provided in reference to previous methodology being utilized in the past and the pros and cons of those methods. Taxpayers could benefit from the use of community services from some of the junior and community colleges. Annette Fitzgerald discussed a pilot program which they are instituting IRS wide. Feedback is coming from the members, and the chair and vice-chair encourages everyone to submit ideas, good ideas.

Technology Subcommittee

Donna Powers said both of the subcommittees are working very hard getting good information and doing a lot of brainstorming. Sandra Akbar, the subcommittee lead discussed items with our subject matter expert, Donny Vestor. Vestor discussed some things IRS has currently implemented and other things IRS has discontinued. The subcommittee looked at his list and the information was comprehensive. An email was sent out as a follow up to encourage everyone to brain storm and think outside the box and utilize media and IRS technology. David Cain added on the non-technology side the possible use of government offices rather than IRS space. Both subcommittees are looking at the same thing, which is good.

Survey Report

Carroll Hatch, TAS Research Program Analyst introduced Bridget Roberts, Deputy Executive Director SA who shared information on the survey and when it would be available. The National Taxpayer Advocate, Nina Olson has received several complaints from taxpayers about the TAC sites and services. W & I program owners were asked by TAP to participate in the survey because of the complaints. The results could possibly be included in the NTA Annual Report to Congress. The survey will be available beginning the week of April 9. As the taxpayers are standing in the lines, the survey will be administered by the TAP member. Each member will have a specific number of surveys provided to them in order to share with the taxpayers. The member would collect the surveys and send to TAP employees to compile the results. The TAP provided some feedback on the questions and was able to tailor a couple of the questions to fit our needs. This effort was shared with the Joint Committee and they were able to critique and offer suggestions for changes to the survey. A brief overview on the types of questions was shared. The survey contains fifteen to sixteen questions. Finalization needs to be completed by the end of this week. Barbara Baldwin asked if anyone pre tested the survey. There has not been a pre-

test done. Morizio said the Joint Committee did not make comments on the administering of the survey. Steve Berkey said the TAP members will hand out the surveys and the taxpayers would hand it back to the TAP member when their visit was completed. Akbar suggested changing the language. Cain asked how outlying areas that are not being served with an appointment be served? Coming up with a different means of getting a survey to this population would be something this committee could work on. Donna Powers pointed out this suggestion could be an excellent recommendation for the committee to present to the IRS. Adding a checkbox on the survey would be helpful to allow the taxpayer the option to choose the reason for taking the survey.

Action Item: Donna Powers will work with Smith on drafting an additional question to be added to the survey by the end of the week.

Hatch is incorporating all eleven comments she received from Susan Gilbert. Curran pointed out an additional comment on how long you should expect to wait and how many people would be there to have their taxes prepared. There could possibly be more than the fifteen people in the TAC offices to have their tax returns prepared. Some of them could be there for other reasons. It is safe to say the survey could be issued to more than fifteen taxpayers in a given day. The surveys should be as simple as possible in order to get the answers from the taxpayers.

D'Eredita inquired as to whether TAS had shared with W&I executives. Roberts responded she believed it had been shared with the Director of Field Assistance. Roberts further agreed to share the questions and locations with the Field Assistance team.

Action Item:

- Hatch will mail out information on where the TAP members will go after she receives a listing of all the TAP members.
- Morizio will have Susan Gilbert send out an inquiry to all the TAP members and find interest. We will match up the members with the nearest TAC offices in their areas based on their zip codes or by using the states the members are in.

Members should keep in mind, there is no travel money available so let's be reasonable in traveling.

Donna Powers asked about the timeframe for returning the surveys and getting the data back. The surveys should be returned as soon as they are completed. The questions we want to add need to be submitted to Carol no later than Thursday, March 15, 2012.

After the surveys come in, analysis will be run after gathering all the information from the surveys. This information could be used in any reports written up by this committee. Any pamphlets or handouts could be shared with the Taxpayers at this time. Instructions and directions have been drafted up, as well as a draft script. Thank you to everyone for your willingness to work with us on this project.

Akbar stated the proposal going out to the TAC offices is a good idea but a more profound idea would be how many miles were actually traveled and how many would you have traveled to reach the population that are not near a TAC office. Toni Smith asked about the one who did not go to the TAC and VITA sites and churches. Members need to work with the coordinator for their state, and they will help on any issues on the surveys. The survey will be limited to front and back on two pages.

Gilbert added Nina Olson's reason for the survey is IRS has cut some of the services provided in the TAC. The committee needs to find out the impact it is having on taxpayers. A possible recommendation would be to contact W&I who could reach out to all of their areas including VITA and other areas for taxpayers who do not use the walk in services. This could help us to find out why people are not going into the TAC offices. It was suggested to add this inquiry onto TAX WISE. It is too late for this issue to be given to the VITA sites at this point. It was suggested to think about this as a possible task for next year. The committee would make a recommendation that W&I would conduct a survey on why taxpayers are not using the walk in offices. Smith will ask her coalition on Low Income Tax Clinics what was used last year in getting people to come back and maybe something we can use in our committee.

Outreach

Fitzgerald expressed thank you to everyone on their Outreach efforts. To some she asked if there were any problems in getting your outreach reports in. There were a total of twenty (20) outreaches conducted. Winifred Browne was commended on her outreach efforts.

ISSUES

23112 – The State of Utah had an alliance with IRS and a one stop shop with a link to TAS. The IRS has closed the site and submitter questioned this, as it provided a real service to the taxpayers to deal with their federal as well as state tax issues. Stakeholders Liaison has a similar one day thing and it is by State level. This maybe something we could try and expand upon. Donna Powers will reach out to them. It was suggested to expand this issue to include all states rather than just Utah. Consensus is to make this an active issue and place it under the Non Technology Sub Committee to research.

Miscellaneous

- Business Cards have been printed. Everyone needs to check and make sure there are no errors.
- Mentors please reach out to the new members and get back to Powers if any concerns or questions.

Public Participation

None

Closing

Curran expressed thank you to everyone for attending and participation. Go forth and do good.



The next meeting scheduled is a teleconference April 10, 2012 at 2:00 p.m. ET. These minutes were approved by the full committee on June 7, 2012.



**Taxpayer Advocacy Panel (TAP)
Face to Face Service Methods Project Committee
Meeting Minutes
February 14, 2012**

Designated Federal Official (DFO)

- Dorry Curran, DFO – Absent
- Morizio, Louis – Program Manager – Acting DFO

Program Owner

- Beth Braddock, W & I Program Owner
- Horton, Toni – Wage & Investment Field Assistance
- Vestor, Donny, W & I Program Owner

Members Present

- Akbar, Sandra
- Baldwin, Barbara
- Cain, David
- Fitzgerald, Annette
- Janci, Gerald
- Patton, Sue
- Powers, Clarke
- Silva, Michael
- Sykes, Edward
- Browne, Winifred

Members Absent

- Smith, Toni

Staff Present

- Babb, Rose A – Management Assistant
- Fields, Anita – TAP Analyst
- Powers, Donna – TAP Analyst

Public Participants

- Espinoza, Manuel – TAP Alternate

Welcome/Announcements

Morizio acted as the DFO, he welcomed everyone to the teleconference.

Chair Comments

Cain welcomed everyone to the teleconference.

Review of Previous Meeting Minutes

The January minutes were approved by the full committee for posting.

Program Owners

Horton did not have anything new to discuss however; she mentioned that there are some new suggestions being developed for the TAC.

Vestor also stated that a list of suggestions have been developed by his office. He stated that members will have an opportunity to look at the list of suggestions and make recommendations to the IRS.

Subcommittees

Powers stated that two subcommittees have been formed, Technology and Non-Technology. The following are a list of the members and their leads:

Technology

Akbar – Lead
Baldwin
Browne
Cain
Janci

Non-Technology

Sykes – Lead
Fitzgerald
Patton
Powers
Silva
Smith

The technology subcommittee will look at the ideas from the program owners and give a citizens' recommendation on its implementation to the IRS. The Non-technology subcommittee will deal with those taxpayers that may not be computer savvy but have access to libraries, banks and may have smart phones. Braddock (Non- Technology) and Vestor (Technology) will be available for any questions or clarifications from members working those subcommittees.

Action Item

Powers will send an email to members with the dates and times the subcommittees will meet each month.

Powers clarified Byrd's role as the program owner. Byrd will provide guidance to the full committee on the technical aspects of the most serious problems affecting taxpayers accessing the Taxpayer Assistance Centers, offices and IRS Websites.

Outreach Report

Fitzgerald discussed the new outreach spread sheet that will be emailed to members by Powers. The new outreach spread sheet has been developed by TAP; this new spreadsheet will provide complete information, with two tabs, one column for hours spent on outreach activities and, "other activities". Other can be talking to taxpayers on the phone or any other form of communication with taxpayers on TAP. The hours spent on outreach and other forms of TAP business will be carried over each month into the new



month. Based on members' hours of outreach activities combined each month, Presidential Volunteer Service Awards will be given annually.

Fitzgerald mentioned that she took the VITA training for VITA sites and shared TAP material with taxpayers on how to submit their ideas and suggestions to TAP.

If you have access to VITA or TCE sites, Fitzgerald suggested to members that they should take TAP material and share with site coordinators also, members can suggest to the site coordinator to place the material on distribution tables.

Vice Chair, Rollins provided a public service flyer on how to improve the IRS. This flyer is posted in TAP Space; members may want to provide their local communities and churches copies during outreach events.

IRS Media Specialist can also help taxpayers get in touch with local news media in their local areas; for assistance on contacting the IRS Media Specialist, members should contact Powers and Fields.

Cain mentioned that he has about 250 clients that visit his office frequently and, he has TAP material available for them to review.

Miscellaneous

Morizio mentioned that due to cuts in our budget, some promotional TAP material can no longer be ordered. Speak Up trifold brochures and TAP Mailers will be the only marketing materials available for outreach activities. Business cards were ordered for members by National Office.

National Taxpayer Advocate, Nina Olson, has a daily blog discussing Taxes and the Taxpayer Advocate Service. Members were encouraged to take a look at the daily blog.

Powers provided a brief description on the difference between TAP and Systemic Advocacy.

Action Item: Powers will send an email to members outlining the difference between TAP and Systemic Advocacy.

Public Participation

Manuel Espinoza, a TAP alternate mentioned the meeting was informative.

Closing

Morizio stated that he thinks the Face to Face Project Committee has a good action plan for this year.

Cain thanked everyone for joining the teleconference.



The next meeting scheduled is a teleconference March 14, 2012 at 2:00 pm ET.

These minutes were approved by the full committee on March 14, 2012.



**Taxpayer Advocacy Panel (TAP)
Face to Face Service Methods Project Committee
Meeting Minutes
January 10, 2012**

Designated Federal Official (DFO)

- Dorry Curran, DFO

Members Present

- Sandra Akbar
- Barbara Baldwin
- David Cain
- Annette Fitzgerald
- Gerald Janci
- Clarke Powers
- Toni Smith
- Edward Sykes

Members Absent

- Winifred Browne
- Sue Patton
- Michael Silva

Staff Present

- Nancy Ferree, TAP Manager
- Louis Morizio, TAP Manager
- Anita Fields, TAP Analyst
- Marianne Dominguez, TAP Analyst
- Donna Powers, TAP Analyst
- Shawn Collins, TAP Director
- Tina D'eredita, Wage & Investment Program Owner
- Toni Horton, Wage & Investment Field Assistance

Guest(s) Present

None Present

Welcome/Announcements

Dorry Curran, DFO opened and welcomed everyone to the meeting. Nancy Ferree also welcomed everyone to the meeting.

Chair Comments

David Cain, chair welcomed everyone to the meeting. Donna Powers took roll and quorum was met. He welcomed the program owners' comments on where this committee would be going. He looks forward to getting our feet on the ground.

Review of Previous Meeting Minutes

There were no minutes to approve due to the fact that the December meeting was an administrative meeting.

Program Owners

Tina D'eredita, the Wage and Investment program owner discussed the newness of her position, as well as the newness of this committee. Toni Horton, who was on the Taxpayer Assistance Center (TAC) project committee last year, and will give future guidance on where this committee is going. Donny Vestor, from W & I provided information previously on some of the technology W & I was utilizing in providing virtual work stations. Tina indicated this was definitely an avenue to research, and Donny would be working with this panel to provide the IRS knowledge.

Discussion ensued on the vision of this committee, and how W & I will provide information. Donna provided information on how the TAC committee was handled last year, and also the fact that she would be meeting with the program owners, as well as the manager to brain storm on possible areas the TAP can look at.

David Cain gave a different perspective – from a person who lives in a rural area. He said one of the main things we need to look at is the purpose of the TAC – its mission, and services. Once we get list, we can look at it and see what we can tackle to get the TAC in touch with the rural taxpayers.

The TAC report from last year gives a lot of good information and Donna indicated she had posted it to TapSpace, and would again send it out.

Louis stated he would meet with Donna offline, to possibly come up with subcommittees to work within.

Donna explained how the TAC complaint reports are pulled off of the database. She will run an additional report so that the panel members will have an opportunity to look at the type of complaints are coming in.

Outreach

Annette Fitzgerald, vice-chair, gave the outreach report. As there were very few outreaches held, she discussed the procedures from the Outreach toolkit. She alerted the panel to the EITC awareness day which will be held on January 27. Donna has a list of the LTA's and will send them out, if desired. She also told the group if they need outreach materials, they should contact Anita or herself.

A template was sent out by Anita for outreach input. She will send out a reminder once a month for outreach input.

Any travel completed must be approved in advance and Anita and Louis should be included in the approval process.



Face to Face Meetings

The meeting will be held in Plantation, FL on June 6 – 8, 2012. Travel will be all day on the 6, full day meeting on the 7, half day meeting on the 8, and travel in the afternoon of the 8.

Miscellaneous

IVT training sessions on TapSpace should be out soon. Some of the panel members have already received the training.

Donna will be in contact with the Media Specialists in each state. She will also be sending out the press release to the new members. If a member needs something printed, they can let Donna or Anita know and they will print the items out and mail them to the members.

Louis asked that any requests should be sent to Donna, with a cc: to Anita Fields, and himself to make sure all requests are handled.

Meeting Close

David told the group he was going to go on the IRS website to begin doing research on the TAC offices and where we might begin in our new project committee. He indicated he was concerned about budget constraints. Louis said the program owners will be involved with us along the way and will guide us. He indicated the panel should not be concerned with money – we do need to make meaningful recommendations that can be implemented that can possibly be completed.

Toni Horton, from W & I Field Assistance joined the meeting. She welcomed the former, as well as the new members of TAP.

The meeting was closed.

The next meeting scheduled is a teleconference February 14, 2012 at 2:00 pm ET.

***Certification: These minutes were approved by the committee by consensus on February 14, 2012.**