



2002 Meeting Minutes Multi-Lingual Issue Committee Meetings

- November 22, 2002
 - October 7, 2002
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Multi-Lingual Issue Committee Meeting Minutes

November 22, 2002
Teleconference

Opening of the Meeting

Committee Chair Beyreis opened the meeting at 1:02 p.m. Eastern Time. She welcomed members and introduced new member Abigail Alicea to the panel.

Roll Call: taken by Note taker TAP Analyst Marisa Knispel, and quorum was reached.

Panel Members Attending

- Abigail Alicea, Nashua, NH
- Linda Bader, Chesterfield, MO
- Mary Balmer, Chapel Hill, NC
- Mary Lou Beyreis, Jacksonville, FL, Chair
- Inez E. DeJesus, Fort Lauderdale, FL, DFO*
- Yvonne Gallegos-Bodde, Oxnard, CA
- Carl Hansen, Indianapolis, IN
- Sharon Lassar, Miami, FL
- Kenneth Logan, Blue Springs, MO
- Sharon Stetz, Salt Lake City, UT
- Bruce Twomley, Juneau, AK

*DFO=Designated Federal Official

Absent

- Nancy Quarles, Southfield, MI (Ms. Quarles has been reassigned to the SB/SE Reducing Taxpayer Burden, Payroll Taxes Issue Committee)

TAP Staff and IRS Staff Attending

- Toni Cross, MLI Program Owner
- Marisa Knispel, TAP Analyst (Note Taker)
- Nikki Oyefeso, MLI Program Owner
- Nancy L. Ferree, Program Manager



Review and Approval of Minutes

Committee Chair Beyreis led discussion on the minutes of the Alexandria Orientation meeting on October 7, 2002. Operating Procedures and Ground Rules were clarified with consensus on the use of e-mail. Only information pertaining to the subjects of Multilingual Initiative and its committee members will be shared so as to avoid excessive use of e-mail. The committee members formed consensus to accept and approve the minutes.

Review of Action Items from last meeting

DFO DeJesus reviewed kiosk information shared with members via e-mail earlier this day. The IRS kiosk system provides taxpayers access to tax information and services in seventeen different locations. Locations are listed on the e-mailed information. Program Owner Cross clarified that kiosks currently provide information in the English and Spanish languages only.

Subsequently, Program Owner Cross led discussion on the issue of breaking the language barriers. She explained that the IRS has been working at a national level to facilitate and educate limited English-speaking taxpayers in meeting their tax obligations for many years. Some accomplishments were made, but the effort continues. She'd like to enlist MLI Committee members in accomplishing the goals of translating IRS forms and publications into various languages, improving the automated translating service and Spanish language Help Line as well as the ongoing taxpayer education outreach efforts. The intent of the IRS is for the committee members to analyze the current processes and develop new ones. Beginning with the identification of languages that the IRS should concentrate in, members should provide recommendations on cost-effective methods to use tax products and services and educate the taxpaying public. The IRS is in the process of identifying additional language priorities to address the growing needs of Limited English Proficiency (LEP) taxpayers.

Sub-committee Assignments

Member Logan shared with the committee an experience his clients encountered in an IRS Tax Assistance Center in Kansas City. Had it not been for his presence and knowledge of the tax system in this occurrence, Mr. Logan explained, the taxpayers would not have been able to understand their problem and its resolution due to their limitation in the English language. It is necessary that IRS offer the services of employees who are proficient in other languages to explain to taxpayers their various tax problems and a way to resolve them.

Member Lassar shared with the committee her investigation on the California Board of Equalization's methodology in providing customers with an array of translation services. The Board of Equalization is responsible for the collection of sales tax in California. Due to their multilingual taxpayers, the Board offers a multilingual initiative that is reviewed each fiscal year. Ms. Lassar has received information on this agency's initiative that she will share with all members. She suggested that the committee consider the Board's methodology as a guide or model for IRS's implementation.

Member Bader raised the question of which avenues does IRS utilize to communicate and educate recent immigrants on their tax obligations. Program Owner Oyefeso explained that IRS educational efforts such as VITA, TCE, etc. concentrate on education for non-English speaking taxpayers, many of whom are recent immigrants. She explained that IRS partners with local organizations to reach these taxpayers. Member Bader suggested that the committee employ these IRS organizational liaisons to identify the necessary language concentrations.

Based on the discussions led by these three members, the committee and IRS Program Owners formed consensus on forming three subcommittees:

- I. Subcommittee-Recommendations/ways on how the IRS can better assist Limited English Proficiency (LEP) taxpayers in navigating the IRS system and understanding its processes-led by Ken Logan & Carl Hansen.



- II. Subcommittee - Recommend ways to externally identify and validate vital documents- led by Sharon Lassar.
- III. Subcommittee -Recommend cost-effective ways to address the needs of recently migrated immigrant groups and educate them on tax compliance-led by Linda Bader.

Meeting Schedule

Program Owner Cross suggested that the committee visit a location with an IRS kiosk and a Taxpayer Assistance Center for members to acquaint themselves with these services. Chair Beyreis recommended that a face-to-face meeting be held in February. The members formed consensus to hold this meeting on February 14 and 15, 2003, its location to be decided.

Future meetings were finalized by consensus as follows:

Date	Time(s)	Via Telephone/Face to Face
January 10, 2003	1:00-2:00PM EST	Teleconference
February 14-15, 2003	TBD*(1-1/2 days)	Face to Face- Location TBD
April 11, 2003	1:00-2:00PM EST	Teleconference
May 16, 2003	1:00-2:00PM EST	Teleconference
June 13-14, 2003	TBD (1-1/2 days)	Face to Face-Location TBD
August 15, 2003	1:00-2:00PM EST	Teleconference
September 19, 2003	1:00-2:00PM EST	Teleconference
October 2003	Annual Business Meeting	Dates to be determined

*TBD=to be determined

Closing Remarks

All agreed the meeting went well and thanked the staff for their support.

Meeting Close

Committee Chair Beyreis closed the meeting at 2:06 PM.

The next MLI Teleconference meeting will be on Friday, January 10, 2003 at 1:00pm EST.



Multi-Lingual Issue Committee Meeting Minutes

October 7, 2002

The TAP members met for the first meeting of the Multi-Lingual Issue Committee on Monday, October 7, 2002 in Alexandria, VA at the Hilton Mark Center. The purpose of the meeting was to receive an orientation on the TAP Guidance; the Wage & Investment Division's organization and begin to lay the foundation for the development for their Committee.

Members in Attendance:

- Mary Balmer
- Ken Logan
- Nancy Quarles
- Mary Lou Beyreis
- Linda Bader
- Carl Hansen
- Sharon Lassar
- Sharon Stetz
- Bruce Twomley
- Toni Cross
- Olanike Oyefeso
- Mary Davis
- Inez E. DeJesus, Designated Federal Official/Program Analyst
- Laurie Keleman (Advocate in LA Area 7, didn't sign sheet)
- Deryle Temple (Area Advocate in NYC formerly of LA, didn't sign sheet)
- Matt Mihovich of the original CAP offered to assist this group as necessary
- Facilitator: Nina Mentuccia, ICLD

Committee Members expressed their goals and expectations of the first meeting and for the Committee:

- (This will be done at the next meeting)

Wage & Investment Division Organization and Multi-Lingual Initiative Program Overview Mary Davis, Program Owner provided a detailed overview of the W&I Multi-Lingual Program.

Development of the Committee's Operating Procedures

The Committee developed Multi-Lingual Issue Committee Operating Procedures.

The Committee revised and combined the "Ground Rules & Behaviors During and Between Meetings" template that was provided to them as a guideline.

Multi-Lingual Issue Committee Meeting Dates for 2002/2003:

Exact meeting times will be determined at a future date.

Agreement in principle to meet every 6 weeks:



Tentative Dates:

- Week November 17
- Week January 12
- Week February 23
- Week April 7
- Week May 18
- Week June 29
- Week August 10
- Week September 21

Handouts during the Meeting: Program Owner's Handout on "MLI -Expanding our services to meet the needs of our customers"

Multi-Lingual Committee Decisions Made:

Temporary Chair: Mary Lou Beyreis (until committee membership is filled, elections will be conducted)

Plan to conduct meetings face-to-face unless otherwise specified.
Per operating guidelines, virtual meetings will be used.

Possible Agenda topics for Future Meetings

Next Meeting's 11/22 Conference Call 1:00 p.m. EST (1 hour) Agenda

1. Background on kiosks
2. Critical Measures of Success/Critical Success Factors
3. Develop problem statement based on pg. 15 & 16 of W&I presentation document
4. Background to include 2000 Census - Language Preference
5. Inez will provide Team Time Matrix prior to next meeting

Every member to be familiar with operating procedures, etc. for conference call meeting.

Pre-reads to come out 1 week before meeting October 17, 2002.