



2005 Meeting Minutes Multi-Lingual Issue Committee Meetings

- September 13, 2005
 - August 9, 2005
 - July 12, 2005
 - June 24-25, 2005
 - May 17, 2005
 - April 12, 2005
 - March 8, 2005
 - February 8, 2005
 - January 11, 2005
-

Multilingual Initiative (MLI) Committee Meeting Minutes

September 13, 2005

Program Owners

- Stevens, Sharese, MLI Program Owner
- Correa, Marilyn, MLI Program Analyst

Designated Federal Official

- De Jesus, Inez E., Analyst, Acting DFO

Committee Members Present (These attendees count for quorum)

- Fireman, Jerald- Edmonds, WA
- Havey, Dorothy-LincolNville, ME
- Irizarry, José-San Juan, PR
- Kreisler, Steve-Potomac, MD
- Lawler, Mary Ann-Dearborn, MI
- McKenzie, Clifford-Del City, OK
- Meissner, Joseph-Cleveland, OH
- Perros, Theodore-Washington, DC
- Richardson, Lovella-Knoxville, TN
- Sosa, Iris- Fontana, CA
- Twomley, Bruce-Juneau, AK, Chair

Committee Members Absent

- Curol, Helen- Lake Charles, LA
- Jones, Delford- Griffith, IN
- McElroy, Paul (excused)-Winston-Salem, NC



TAP Staff

- De Jesus, Inez E., Analyst
- Odom-Russell, Meredith, Note Taker

Welcome

Chair Bruce Twomley opened the meeting by welcoming everyone.

Roll Call (quorum has been met)

Review Agenda

There were no objections to the proposed agenda

Approval of Meeting Minutes

June 24 and 25, 2005, July 12, 2005 & August 9, 2005 Minutes were approved by the committee.

Program Owner's Report

Ray's leaving is causing a burden. There has not been a replacement for him as of yet. Trying to contact Stevens and Correa may become challenging but they are there.

Project Team Reports:

Team 1: Needs Assessment Team

At the face-to-face meeting in D.C., the team came up with a one page survey to assist the needs of Asian's in the territory of the committee members, which included Oklahoma, Tennessee, Louisiana, and Indiana. The survey was sent to the stakeholders in Tennessee and Oklahoma; Louisiana was deleted because it did not get there before the hurricane and the committee felt it could not be administered properly under the circumstances. There is an organization in Indianapolis that initially expressed an interest and requested a short report from Twomley by way of introduction to the project. There has not been any communication with the organization to know of their status. The surveys are due to Sharese Stevens by September 30, 2005. The committee hopes to have some results by October 15. The Memphis Group Shareholders asked to extend it's time to October 15, and hopes to have a report ready for the face-to-face Annual Meeting in Washington, DC by October 30th. Stevens recommends allowing everyone to extend their date until October 15, this gives more time to make connections with the Indiana folks. Translated copies of the survey since they are in Vietnamese, Chinese and Korean will be emailed to the committee in the English version.

Team 2: Education Team

Correa will set up a conference call with Team 2 to decide how the course will be tabled out for the LITC clinics and all other individuals. Hopefully the gentleman that contacted the committee at the Tax Forum might be able to provide feedback at the conference call. Perros worked on the final report which is very concise and clear, it's a matter of deciding who is going to deliver the course.

Team 3: LITC Communication Team

A survey was created for the LITC Directors. This survey will be submitted to each local LITC. Alan Goldberg approved the survey and informed the LITCs the survey would be done. All of the surveys should be in by the end of September in order to come up with a complete report. This will establish a central clearing house to contain all of the Non-English material that is used to educate LITC clients. A suggestion was made to put all of the surveys together and send one email with all of the surveys attached. Toni Cross is looking at having all of the reports in by the end of the month to have a compiled report by the end of September.



MLI Annual Report

Twomley will produce an Annual Report for the committee as a whole. This will be done by having final reports by each of the teams and each of reports will stand alone and be presented as the body for the MLI Annual Report. Each of the teams and their chairs should provide an account of what the committee wants to be presented to the rest of TAP. These reports should be sent in by the end of next week.

News from Staff

Inez thanked the members that are not returning for their time with TAP.

Action: All Pending Action Items are fine.

Action/Assignment Review

- Chair- will prepare the TAP MLI Self-Assessment report.
- Committee Members- each team leader will be submitting their respective reports to the chair.
- Staff/Program Owners-Marilyn Correa will be having a conference call in respect to Team #2.

Closing/Assessment

- Meeting adjourned 3:20 PM
- The next meeting will be the TAP Annual Meeting in Washington, DC, from November 2-5, 2005.

***These minutes were approved by the TAP MLI Issue Committee on November 15, 2005 by consensus (via email).**



Multilingual Initiative (MLI) Committee Meeting Minutes

August 9, 2005

Program Owner

- Sharese Stevens, MLI Senior Policy Analyst

Designated Federal Official

- Nancy L. Ferree, TAP Program Manager, Plantation, FL

Committee Members Present (These attendees count for quorum)

- Jerald Fireman, Edmonds, WA
- Paul McElroy, Winston-Salem, NC
- Clifford McKenzie, Del City, OK
- Lovella Richardson, Knoxville, TN
- Bruce Twomley, Juneau, AK, Chair

Committee Members Absent

- José Irizarry, San Juan, PR
- Delford Jones, Griffith, IN
- Steve Kreisler, Potomac, MD
- Mary Ann Lawler, Dearborn, MI
- Joseph Meissner, Cleveland, OH
- Theodore Perros, Washington, DC
- Iris Sosa, Fontana, CA
- Robert Stokes, Kemp, TX
- Dorothy Havey, Lincolnville, ME
- Helen Curol, Lake Charles, LA

TAP Staff

- Inez E. De Jesus, TAP Program Analyst
- Jenny Reyes, Secretary, Note Taker

Guests

- Lourdes Montes
- Robin McKinney – East Harbor CDC, Baltimore, MD
- Oksana Stowbonenko – Tax Specialist, WI Customer Accts.
- Karen Summers Murray – GC Services

Welcome

Chair Bruce Twomley opened the meeting by welcoming everyone.

Roll Call

Quorum was not met. Chair Twomley mentioned there has been no quorum for two meetings in a row.



He suggested an email meeting reminder be sent to all panel members. Chair requested Analyst De Jesus prepare an email about quorum attendance and send to all panel members.

Approval of Previous Meeting Minutes

The minutes of June 24-25 and July 12, 2005 were not approved. They will be moved to next month agenda for approval.

Brief Review of Pending Action Items – DFO Ferree

None

Program Owner’s Reports

Sharese Stevens gave an update of program owner activities for the last month. She indicated the final target date for Team projects is September 30, 2005.

Project Team Reports:

#1 – Needs assessment Team

Lovella Richardson reported on Team 1 activities.

#2 – Education Team

No report Team Leader not available.

#3 – LITC Product/Communication Team

Jerald Fireman and Paul McElroy reported on Team 3 activities.

Public Input

Each guest gave a brief description of their organization and how it relates to the MLI Committee Activities.

Office Report

DFO Ferree reminded panel members to request advance approval of travel funds if needed for the Teams Activities.

Panel members’ discussion - TAPSpeak

Chair Twomley asked for panel members preferences regarding TAPSpeak notifications as opposed to email notification. All members present indicated they prefer email rather than TAPSpeak for primary notification.

Closing Remarks

The Meeting was adjourned at 3:15pm EDT

The next MLI committee meeting will be September 13, 2005 at 2:30pm EDT by teleconference.

***These minutes were approved by consensus on September 13, 2005 by the MLI Issue Committee.**



Multilingual Initiative (MLI) Committee Meeting Minutes

July 12, 2005

Program Owner

- Toni Cross, Chief MLI

Designated Federal Official

- Nancy L. Ferree, TAP Program Manager, Plantation, FL

Committee Members Present (These attendees count for quorum)

- Paul McElroy, Winston-Salem, NC
- Lovella Richardson, Knoxville, TN
- José Irizarry, San Juan, PR
- Mary Ann Lawler, Dearborn, MI
- Theodore Perros, Washington, DC
- Robert Stokes, Kemp, TX
- Bruce Twomley, Juneau, AK, Chair

Committee Members Absent

- Dorothy Havey, Lincolnville, ME
- Steve Kreisler, Potomac, MD
- Clifford McKenzie, Del City, OK
- Joseph Meissner, Cleveland, OH
- Iris Sosa, Fontana, CA
- Helen Curol, Lake Charles, LA
- Jerald Fireman, Edmonds, WA
- Delford Jones, Griffith, IN

TAP Staff

- Inez E. De Jesus, TAP Program Analyst

Welcome

Chair Bruce Twomley opened the meeting by welcoming everyone.

Roll Call

Quorum of 8 was not met.

Review Agenda

The committee offered no changes to the previous meeting's minutes. Approval of the minutes will be added to next meeting's agenda when quorum is met.

Review Assignments

DFO Ferree stated there were no outstanding assignments.



Project Team Reports:

Team 1 Needs Assessment Team

Lovella Richardson provided an update of team activities.

Team 2 Education Team

Bob Stokes provided an update.

Team 3 LITC Communication Team

Mary Ann Lawler provided an update.

Public Input

There was no public input.

Office Report

No pending issues to report.

Closing/Assessment

- Meeting adjourned at 2:55pm EDT
- Next meeting scheduled for August 9, 2005 at 2:30 EDT

***These minutes were approved by consensus, by the MLI Issue Committee on September 13, 2005.**



Multilingual Initiative (MLI) Committee Meeting Minutes

*June 24-25, 2005
Face to Face Meeting
Washington, DC*

Program Owner

- Toni Cross, Chief MLI
- Sharese Stevens, MLI Senior Policy Analyst
- Marilyn Correa, MLI Policy Analyst
- Ray Mills, MLI Policy Analyst
- Yolanda Myers, MLI Administrative Assistant
- Carrie Schaffer, MLI Contractor

Designated Federal Official

- Nancy L. Ferree, TAP Program Manager, Plantation, FL

Committee Members Present (These attendees count for quorum)

- Jerald Fireman, Edmonds, WA
- José Irizarry, San Juan, PR
- Delford Jones, Griffith, IN
- Steve Kreisler, Potomac, MD
- Mary Ann Lawler, Dearborn, MI
- Paul McElroy, Winston-Salem, NC
- Clifford McKenzie, Del City, OK
- Joseph Meissner, Cleveland, OH
- Theodore Perros, Washington, DC
- Lovella Richardson, Knoxville, TN
- Iris Sosa, Fontana, CA
- Robert Stokes, Kemp, TX
- Bruce Twomley, Juneau, AK, Chair

Committee Members Absent

- Dorothy Havey, Lincolnville, ME
- Helen Curol, Lake Charles, LA

TAP Staff

- Inez E. De Jesus, TAP Program Analyst
- Laverne Walker, Secretary
- Martha Curry, Analyst



Guests

- Allan M. Goldberg, LITC Director Rep.
- Anita Soucy, Latham & Watkins, LLP. Washington, DC
- Daniel K. Hsiung, Harlem Community Law Office

Welcome

Chair Bruce Twomley opened the meeting by welcoming everyone.

Roll Call

Quorum was met.

Review Agenda

The committee accepted the agenda.

Approval of Previous Meeting Minutes

The minutes of May 17, 2005 were approved and accepted by all.

National Office Representative Comments

Martha Curry welcomed everyone on behalf of Bernie Coston, TAP Director.

Nomination for Vice Chair

Chair Twomley reminded panel members that a vice chair is needed and welcomed nominations. Ballots were distributed and the election will be held Saturday at the beginning of the meeting.

Meeting Objectives

Sharese Stevens provided an overview of the meeting objectives. Guests were introduced to the panel.

Guests input

Allan Goldberg spoke on LITC's and how they work with IRS and the multilingual initiative. Attorney Anita Soucy spoke on her involvement with a LITC clinic, as well as adult education, citizenship, and ESL populations. Attorney Daniel Hsiung spoke about his involvement with the Chinese population thru the LITC. He states ESL classes are a good outreach opportunity since the classes are well-attended. A handout was provided. All guests answered questions from the panel.

Agenda Items- Team Breakout Sessions

Sharese explained where each breakout team would meet. Team 1 Needs Assessment Room 516, Team 2 Education Room 515, Team 3 LITC Communications Zenith room. The teams were advised to return to the main meeting room at 4:15 for day one wrap-up.

Day one Wrap up

The teams returned for Day 1 wrap up.

Day Two- Saturday, June 25, 2005

Opening Day Two

Sharese Stevens opened day two with a welcome to all.



Vice Chair Election

Robert Stokes was elected by consensus to Vice- Chair.

Chair Message

Bruce Twomley announced that each team leader is responsible for providing him with a draft of the final report by the end of August 2005. Bruce will produce a consolidated draft by first part of September 2005 to each team, and will produce a final report by the end of September 2005.

Teams continued breakout groups to finalize presentations.

Teams' final report out

Each team provided a report of the breakout groups.

Team 1- Needs Assessment- Lovella Richardson reported on team activities and stated that their goal is to have a final report by end of September 2005.

Team 2 – Education – Robert Stokes provided team report on ESL activities.

Team 3 – LITC Product Team- Steve Kreisler provided update on LITC products and activities.

Each team prepared flip charts which will be reduced to typed pages for future reference.

Closing Remarks:

Program Owner Message

Toni Cross provided comments. Her expectation is that each team will take at least one step to complete one activity on their team strategy plan. Toni thanked all panel members, guests, and TAP staff for the cooperation and hard work that everyone accomplished prior to and during this two day meeting.

Chair Closing Message

Bruce Twomley thanked everyone for their dedication, hard work and contributions to this process. He added that Delford Jones should be kept in mind as a political organizer in the event that any of us (as private citizens- not TAP members) ever wished to take an issue beyond TAP to our Congressional delegations. Bruce also thanked the program owners for the support they provided throughout this working year.

The Meeting was adjourned at 10:30am.

The next MLI committee meeting will be July 12, 2005 at 2:30pm eastern time by teleconference.

***These minutes were approved by the TAP MLI Issue Committee on September 13, 2005, by consensus.**



Multilingual Initiative (MLI) Committee Meeting Minutes

May 17, 2005

Program Owner(s)

- Sharese Stevens, MLI Senior Policy Analyst
- Marilyn Correa, MLI Policy Analyst

Designated Federal Official (DFO)

- Nancy L. Ferree, TAP Program Manager, Plantation, FL

Committee Members Present

- Helen Curol, Lakes Charles, LA
- Jerald Fireman, Edmonds, WA
- José Irizarry, San Juan, PR
- Delford Jones, Griffith, IN
- Mary Ann Lawler, Dearborn, MI
- Theodore Perros, Washington, DC
- Robert Stokes, Kemp, TX
- Bruce Twomley, Juneau, AK, Chair

Committee Members Absent

- Dorothy Havey, Lincolnville, ME
- Steve Kreisler, Potomac, MD
- Paul McElroy, Winston-Salem, NC
- Clifford McKenzie, Del City, OK
- Joseph Meissner, Cleveland, OH
- Lovella Richardson, Knoxville, TN
- Iris Sosa, Fontana, CA

TAP Staff

- Inez E. De Jesus, TAP Program Analyst, Note Taker

Welcome

Chair Bruce Twomley opened the meeting by welcoming everyone. He shared that the committee's Self-Assessment Report needs to be submitted by September 2005 to the Joint Committee; therefore, the committee needs to document their on-going activities so that they are captured on the report.

Since MLI Vice-Chair David Terrazas resigned on April 22, 2005, the Vice-Chair Position needs to be filled; the committee agreed to table this till the next meeting.

Roll Call

Quorum of 8 was met.



Review Agenda

The committee accepted the agenda.

Approval of April 12, 2005 Meeting Minutes

Chair Twomley noted that on Page 3 of these minutes, at the end of first paragraph, "the team leader for Team #1 should be Lovella Richardson, and not Helen Curol as noted". Committee agreed by consensus, that once this change is made, these minutes are "approved as modified".

Review Assignments

The following action items from the previous meeting were discussed as follows:

- On May 4, 2005, Analyst Inez E. De Jesus updated the Master TAP MLI Committee Team Charter with all the members' approvals and distributed to all on same date via email.
- Jenny Reyes, TAP Secretary, has made the airline reservations for the upcoming face-to-face meeting in DC, and Inez has coordinated the hotel reservations and has sent confirmation information to all.
- The May 10th teleconference call was cancelled as previously discussed and re-scheduled for today.

Agenda Items

Program Owner's Reports: Sharese Stevens shared that Team 1 and Team 3 has met since the last meeting, but Team 2 has not.

Stevens has been reading and reviewing the historical documents on the ESL (English as a Second Language) Program with Toni Cross. Chair Twomley impressed on Ms. Stevens that he would be available to address any questions she may have on ESL created by Ms. Sally Sandy.

Team 2 will be having a teleconference meeting prior to the committee's face-to-face meeting.

Chair Twomley expressed his appreciation to the Program Owners for their commitment to this program.

Confirm Team Leaders:

Team #1: Lovella Richardson
Team #2: None at this time
Team #3: Steve Kreisler

Reports from the Teams:

- **Team #1, MLI Needs Assessment:** On behalf of Lovella Richardson, Sharese Stevens shared that information has been given to this team on the Limited English Proficient (LEP) Asian Demographics; the profiles on Asians in their communities. The goal is to focus at the face-to-face meeting on what areas are of importance to these taxpayers. This team plans on developing a survey document that may be used in the near future.
- **Team #2, Education:** Correa and Ferree noted that there was no information to be reported during this call; they are still looking at strategy for this team and Chair Twomley stated that he is available to provide feedback.
- **Team #3, LITC Communications:** Since Kreisler was not available to provide feedback, Sharese Stevens reported that this team recently met via teleconference and had a very



productive meeting. The Strategy Plan was distributed for review by the team and they were in agreement with the proposed strategy.

Review Draft Agenda for Face-to-Face Meeting

There were no objections to the draft agenda.

Activities assigned by the Program Owner(s)

None at this time.

Office Report

DFO Ferree reminded everyone that this issue committee should focus their attention to "activities assigned by the program owners" and not the traditional Outreach which is conducted in the area committees. General information from the Joint Committee will be shared via the area committees. This committee's attention should be involved with multilingual initiatives as directed by the MLI Program Owners.

Action/Assignment Review

Decision: Committee agreed that the "Election for Vice-Chair Position" will be held during the face-to-face meeting.

Action: Election for Vice-Chair Position will be added to the June 24/25, 2005 agenda by the TAP Staff.

Public Input

None.

Closing/Assessment

- As previously agreed, the Meeting Satisfaction Survey will be sent by email to all immediately after this call.
- Before closing, Perros shared his concerns regarding the Federal Tax Reform Panel's Report to the Secretary of the Treasury by July 31, 2005. Also, Robert Stokes briefly shared his visit to the Dallas Independent School District's ESL Department. Chair Twomley adjourned the meeting after thanking the Program Owners for their investment with the 3 teams and he stated that he was looking forward to the face-to-face meeting.
- The next meeting will be the face-to-face in Washington, DC on June 24th, and June 25, 2005 at One Washington Circle Hotel.

***These minutes were approved by the TAP MLI Issue Committee on June 24, 2005 by consensus.**



Multilingual Initiative (MLI) Committee Meeting Minutes

April 12, 2005

Acting Designated Federal Official (DFO)

- Sallie Chavez, TAP Program Analyst

MLI Program Owner(s)

- Toni M. Cross
- Sharese Stevens
- Raymond G. Mills
- Marilyn Correa

Members Present

- Jerald Fireman, Edmonds, WA
- Dorothy Havey, Lincolnville, ME
- José Irizarry, San Juan, PR
- Steve Kreisler, Potomac, MD
- Mary Ann Lawler, Dearborn, MI
- Paul McElroy, Winston-Salem, NC
- Joseph Meissner, Cleveland, OH
- Clifford McKenzie, Del City, OK
- Theodore Perros, Washington, DC
- Lovella Richardson, Knoxville, TN
- Iris Sosa, Fontana, CA
- Robert Stokes, Kemp, TX
- Bruce Twomley, Chair, Juneau, AK

Panel Members Absent

- Helen Curol, Lakes Charles, LA
- Delford Jones, Griffith, IN
- David Terrazas, Vice-Chair, Santa Cruz, CA

Staff Present

- Martha J. Curry, TAP Senior Program Analyst
- Inez E. De Jesus, TAP Analyst & Note Taker

Welcome/Announcements/Review Agenda

Analyst Inez E. De Jesus shared that Program Analyst Sallie Chavez will be the acting Designated Federal Official during this call, and that TAP Director Bernie Coston had planned on participating on this call, but due to a last minute notification of an executive meeting, he has designated Senior Program Analyst Martha Curry to represent him.

Chair Bruce Twomley opened the meeting by welcoming everyone, and expressed his appreciation towards Sallie Chavez, Martha Curry, and Marilyn Correa's participation on this call. Twomley then inquired if there were any comments on the agenda and there were no objections.



Roll Call (Quorum=8)

Quorum was met; 13 members present.

Joint Committee Report

None.

Review/Approve Meeting Minutes- March 8, 2005

These minutes were approved unanimously by consensus.

Confirm Completed Action Items Since March 8, 2005

DFO Chavez provided the committee with the following status report on the "action items" from the previous meeting:

1. On Page 2.
 - o Review of the 3 MLI Project Teams Charters and Assignments are on the agenda for today's call.
 - o List of Members Individual Skills was completed on by the TAP Staff on April 4, 2005.
 - o Toni Cross reported during today's call that the LITC Surveys are on schedule and by the end of May 2005 they should be able to provide this panel with a final status report.
2. On Page 3.
 - o Regarding the "bilingual brochures" Mills reported during today's call that "We are going to move forward, same as last year, there may be some minor changes depending on tax law changes; status on any new products, there is no final decision yet."
 - o There will be from now on a "Report Out Session" on the agenda where each MLI Team will have an opportunity to share information with the entire panel.
3. On Page 4.
 - o Panel members signature on the Master TAP MLI Committee Team Charter has still not been completed by Analyst De Jesus. **Action item for Inez: obtain approval from each member once they meet with their sub-committees and have no objections to charters.**
 - o Mills shared that "yes" he has received responses from all by March 11, 2005 as stated in the previous meeting minutes.
 - o Mills confirmed also that all the team packets were sent out to all the panel members.
 - o Inez sent out on March 10, 2005, information to all on how to set up conference calls using the AT&T Teleconference Services.
4. On Page 5.
 - o Email to the staff with their preferences for meeting dates by no later than March 11, 2005 was done timely

Reach Consensus on Charters & Team Assignments & Reports from Each Team:

- **#1-Needs Assessment Team**

Sharese Stevens reported that this team met on April 1, 2005 via teleconference and their charter was ratified. The focus of the call was to obtain consensus on how the Needs Assessment will be conducted. They identified demographic populated Asian Limited English Proficient areas in the states of the Team Members. They reviewed the proposed strategy and there were no objections. They also looked at demographic data, and agreed on targeted areas. Their next meeting is scheduled for April 29, 2005. Their team leader will be Lovella Richardson.

Stevens asked if Team #1 had received the package she sent in the mail to them and the response was; "Yes".



- **#2- Education Team**

Ray Mills reported that this team met on April 1, 2005 via teleconference and their charter was ratified; all but one team member was present on the call. This team reviewed information from Sally Sandy's ESL, Adult Education Short Course on IRS Compliance. Ms. Sandy was the first individual in the United States to receive a grant in order to create this format. The group is currently reviewing this information. No team leader has been selected yet; Nancy Ferree was coordinating the efforts in obtaining a team leader. The next meeting will be scheduled upon Ferree's return.

- **#3- Low Income Tax Clinic(s) (LITC's) Communications Team**

Toni Cross reported that this team has not met yet; they do have plans to meet on April 26, 2005 at 1:30 PM Eastern Time. Cross stated that if any of the team members were not able to participate during this time, to please let her know. The proposed strategy has been sent out to all for their review. Information on the LITC's has been sent out; they plan on identifying areas. Cross will be working with the LITC Program Manager. She asked if the members were familiar with any of the LITC's in their areas.

Joe Meissner shared information from the LITC conferences he has attended.

Confirm Team Leaders

Lovella Richardson will be the Team Leader for Team #1.

No selections have been made yet for the other 2 teams. **(Action/follow-up item)**

Next Steps for the 3 MLI Teams

Chair Twomley stated that the next steps will be shaped by what takes place at the upcoming face-to-face meeting in June in D.C. Cross stated that this will be a working meeting; each team should think about what they will be bringing and hope to accomplish; what are the deliverables?

Face-to-Face Meeting Confirmation

Inez shared that with the coordination of Ray Mills and Nancy Ferree, arrangements have been made to hold the face-to-face meeting at:

One Washington Circle Hotel, Located at One Washington Circle, NW, in the Foggy Bottom section of Washington, DC.

The dates of the meeting: Friday, June 24, 2005 and half a day on Saturday, June 25, 2005. (travel days will be June 23rd and June 25th for most members with the exception of some from the West Coast)

Inez promised to send out an email immediately following this call with all the details and with an attachment of the "TAP Reservation Request Form". TAP Secretary **Jenny Reyes will be coordinating all the airline reservations and Inez will be coordinating the hotel reservations.**

Inez advised all NOT to send credit card information via email. Inez will be contacting each member individually. So far, she was only aware of Theodore Perros not being able to attend. She reminded others to please let her know if they will NOT be attending.

***Change May 10, 2005 Meeting Date**

Inez shared that since the TAP Staff has recently been informed that there will be a staff meeting in Chicago on this same date, therefore there is a need to change this meeting date. The 2 dates that were being considered were May 3rd and the 17th, and it is too late now to submit the required



Federal Register Notice in a timely matter for May 3rd. After discussion, the panel agreed to **change the meeting to May 17 at Noon time, Eastern Time, instead of the usual 2:30 PM ET**, in order to accommodate some panel members. **Action item for Inez: officially change the meeting date to May 17th, and ensure that the Federal Register is submitted timely, and inform everyone concerned of this change.**

Public Input

None.

Closing Assessment

During the call, Ray Mills shared that this will be his last meeting with the panel since he accepted a job with Homeland Security which he begins on Monday, April 18, 2005.

MLI Strategy Office, Policy Analyst, Marilyn Correa will be stepping in as MLI Education Team #2's representative, and Policy Analyst Sharese Stevens will be assisting as well until Ray's position is filled under special request. Mills also reported that he will be sharing information with Marilyn Correa within the next couple of days. Toni Cross expressed her gratitude towards Ray and all the work he has done with the TAP/MLI group and he will be greatly missed.

The panel unanimously also expressed kudos to Ray and wished him all the best in his future endeavors.

Senior Program Analyst Martha Curry reported on behalf of the TAP Director that we are in the midst of the Recruiting Period for new panel members. So far, 228 final applications have been received and there are 263 applications in draft form. There is representation from all but 5 states. There are 47-48 slots to fill.

Chair Twomley thanked Martha for this information.

Jerry Fireman raised an issue regarding the recent news received from TAP Director Bernie Coston, referencing cuts to customer service at IRS, and he wondered how this may affect the Multilingual Initiative project. After brief discussion, Twomley thanked Fireman for bringing this topic up and requested that the MLI Strategy Office keep the committee informed if there will be any risk in the future of these cuts affecting MLI and TAP.

Twomley thanked Mills again for all of his efforts, and the meeting was adjourned.

***The next teleconference meeting will be held on Tuesday, May 17, 2005 at Noon time Eastern Time (1 hour)**

These meeting minutes were approved as modified on May 17, 2005 by the TAP MLI Issue Committee.



Multilingual Initiative (MLI) Committee Meeting Minutes

March 8, 2005

Designated Federal Official (DFO)

- Nancy L. Ferree

MLI Program Owner(s)

- Raymond G. Mills
- Sharese Stevens

Members Present

- Helen Curol, Lakes Charles, LA
- Jerald Fireman, Edmonds, WA
- Dorothy Havey, Lincolnville, ME
- José Irizarry, San Juan, PR
- Delford Jones, Griffith, IN
- Steve Kreisler, Potomac, MD
- Mary Ann Lawler, Dearborn, MI
- Paul McElroy, Winston-Salem, NC
- Clifford McKenzie, Del City, OK
- Theodore Perros, Washington, DC
- Lovella Richardson, Knoxville, TN
- Iris Sosa, Fontana, CA
- David Terrazas, Vice-Chair, Santa Cruz, CA
- Bruce Twomley, Chair, Juneau, AK

Panel Members Absent

- Joseph Meissner, Cleveland, OH
- Robert Stokes, Kemp, TX

Guest(s)

- Greg Holt, Government Markets Manager, Language Line Services

Staff Present

- Inez E. De Jesus, TAP Program Analyst/Note taker

Welcome/Announcements/Review Agenda

Chair Bruce Twomley began the meeting by welcoming everyone and shared that he had no news, and apologized for sharing his report to the Joint Committee late. There are three items mentioned in the report that have been returned to the panel and these will be discussed during the review of actions items portion of the agenda.



Roll Call (Quorum=8)

Quorum was met; 14 members present.

Joint Committee Report

Vice-Chair David Terrazas had participated on the Chair's behalf during the last Joint Committee meeting and stated there was no news to report; discussion had to do more with administrative travel issues.

Review/Approve Meeting Minutes- February 8, 2005

The February 8, 2005 minutes were approved by consensus.

Confirm Completed Action Items Since February 8, 2005

DFO Ferree reviewed the list of previous action items and noted that all were completed with the exception of:

- Page 2, The 3 MLI Project Teams Charters & Assignments were delivered a few minutes prior to this call. **Action item: Pending review by the panel.**
- Page 4, Regarding Members Individual Skills, list is complete with the exception of one member and that will be addressed off-line. **Pending follow-up by Analyst De Jesus.**

Twomley thanked Mills for the detailed letter response that the Program Owners prepared to the National Women's Law Center. This response is very useful in summarizing the status of various projects within the Multilingual Initiative.

In addition, Chair Twomley addressed the panels' review of the responses received from the IRS on the Low Income Tax Clinic(s) -LITC's Surveys and Bi-lingual brochures.

Regarding the LITC Surveys, in the Spring of 2004, "the MLI Issue Committee requested the annual LITC survey include questions with respect to the level of service from the Taxpayer Advocate Service. On January 21, 2005, Toni Cross, Chief, MLI Strategy Office responded as follows:

"Our LITC Customer surveys have been approved by OMB, and have been distributed to the LITC Directors. At this point, we cannot make any changes to the survey. We value your opinion and will keep your recommendation/comments under advisement for our next round of surveys".

Mills stated that in the next round, the MLI Strategy Office will be sure that these are available to be taken and used. **Action item for Cross/Mills:** keep the panel informed of the status of the LITC Surveys.

Regarding the bilingual brochures, Twomley shared the following as stated in his most recent report: "In the fall of 2004, the MLI Issue Committee recommended the bilingual brochure with respect to the Taxpayer Advocate Service's (TAS') power to issue taxpayer assistance orders to release levies. On January 21, 2005, Toni Cross, Chief, MLI Strategy Office responded as follows:

The bilingual brochures are currently being revised and your suggestion for adding information on the Taxpayer Advocate's Service's power to issue taxpayer assistance orders will be considered. All changes to this brochure must be approved by the TAS Office. We will keep you apprised of our efforts." **Action item for Cross/Mills:** keep the panel informed regarding the bilingual brochures mentioning TAS to LEP's.

Updates on 3 MLI Project Teams/Charter & Rosters



- Mills began by providing an overview of the charters and their purpose and goals of each team. (Feedback, Education, and Product Development Teams)
- He also explained how each person was either given their first or second choices. No one received their third choice. He requested that everyone review their assignments and if there were any objections to please let it be known; there were no responses.
- Mills attempted to match teams with members' skills.
- Mills mentioned that as issues are received, they should fall under one of these teams. Each team may share one issue at times.
- Mills explained the terminology: "Ethnic Island" which represents an area where LEP taxpayers live, for example, China Town; it can be a 2 block area where the individuals do not have to leave their locality and all their needs are met. Ethnic islands are not only in big cities but in rural areas as well. Each team will be provided by the Program Owner(s) with data that they will need.
- The teams will have a system in which to measure their success and this information will be incorporated into the year end report.
- Each team will be meeting individually and reporting out during the monthly calls. In the future, after roll call, there will be a report out session on the agenda. **Action item for Analyst De Jesus/Ferree.**
- The MLI Program Owners will provide leadership guidance on each team.
- Mills inquired at this point if everyone was okay with the team that they have been assigned to, and if there was any wish to amend the charter. Various panel members indicated that since the email with this information had been sent just prior to this meeting, they had not had time to review.

At this point, Theodore Perros shared his views regarding the simplification of the tax code and how this may affect the concept of translating documents. Perros had attended last week, the President's Advisory Panel on Federal Tax Reform and Mr. Greenspan and National Taxpayer Advocate Nina Olson were the main speakers at this event. Perros wonders if we are wasting monies on translating documents since most likely the tax code will be changing again soon. Mills responded that not every document needs to be translated. As mandated by Executive Order 13166, federal agencies are to provide meaningful access to products and services to persons with Limited English Proficiency (LEP).

Mills elaborated that the mission is to get basic information out to LEP's.

Sharese Stevens chimed in and shared that the MLI Strategy Office is geared to assist newly arrived immigrants that are not familiar with our tax system. For example, if you work, you must file a W-4 form and have the proper withholding. It's all very basic. The goal is also to not get too complicated.

Both Mills and Stevens shared it is the right time for the panel to be where it is at with the upcoming changes- "we are in the cutting edge, so to speak."

Based on research, the most prominent language in the United States is 71% Spanish, 5% Chinese, and then other languages. The Korean ratio is very small.



Perros inquired on who does the translation. Mills clarified that the LITC's have been doing this but this is considered unofficial documents since it has not been sanctioned by the IRS.

By general consensus of the group, Mills requested that Inez add the names of all the panel members to the master charter and get it signed by everyone. **Action item for Inez.**

Chair Twomley requested that when the panel responds back, it should include everyone so that we are all on the same page. **Action item for all:** review the charters and your assignments and respond back to Ray Mills **by no later than March 11, 2005.**

Action item for Ray Mills: Send out the team packets to the entire panel **by no later than March 18, 2005.**

The panel will need all the necessary data by the end of the month.

DFO Ferree shared that everyone has an AT&T calling card which provides you with the option of setting up teleconference calls. Teams can meet without it being a public meeting. **Action item for Inez:** Send out the information to all on the AT&T Teleconference Service Procedures.

The committee is to address on the Leadership cadre and entertain comments on the team leaders, whether they are to elect someone among their peers.

Mills inquired if perhaps the April call can be longer.

Office Reports

None.

Meeting Satisfaction Survey

DFO Ferree shared that this form that has already been shared with the entire committee, is a great tool for the staff to learn how improvements may be made to the current meeting structure. Ferree stated that this was optional but it will be greatly appreciated if everyone took the time to fill out and return to the staff.

Review of MLI Issues

Mills reviewed the current MLI Issue Matrix and shared the following:

- Issue 2988, MLI Partnering with LITC's, will fall under either Team 2 or 3 (Ed or Product Development.)
- Issue # 2989, Financial Literacy & Education Commission, will fall under Education Team.
- Issue # 3179, Provide Support to USCIS/LEP's, not sure yet under which team this will fall under.
- Issue # 3251, Outreach to ESL, will fall under Product Development Team.

Updates on Face-to-Face Meeting (Dates & Location)

Mills shared the direction and approval he received from Toni Cross regarding the location of the face-to-face meeting. Cross recommends that this meeting be held in New Carrollton, MD/in the D.C. area/in the IRS Federal Building. The LITC Directors will be there and other federal agencies as well which can be invited.

The dates agreed on during the November 2004 annual meeting were:

Friday, June 24, 2005, all day, and half a day on Saturday, June 25th, with travel on June 23rd and the afternoon of the 25th.



Mills suggested if it would be possible to travel instead on Wednesday, June 22nd and meet for one and a half days, and return home on Friday, June 24th in the afternoon. Some members objected to this since they would have to miss extra days from work.

Mills shared that since we will be meeting in a Federal Building; there may not be access on a Saturday.

Action item for panel: email to the staff your preferences for meeting dates by **no later than Friday, March 11, 2005.**

Public Input

Chair thanked Mr. Holt for being on the call and Mr. Holt indicated that he had no input at this time.

Closing Assessment

Chair adjourned the meeting and thanked everyone for their participation.

Next Teleconference Meeting: April 12, 2005 at 2:30 PM ET

***These minutes were approved by consensus on April 12, 2005.**



Multilingual Initiative (MLI) Committee Meeting Minutes

February 8, 2005

Designated Federal Official (DFO)

- Nancy L. Ferree

MLI Program Owner(s)

- Sharese A. Stevens
- Raymond G. Mills

Panel Members Present

- Jerald Fireman, Edmonds, WA
- Dorothy Havey, Lincolnville, ME
- José Irizarry, San Juan, PR
- Delford Jones, Griffith, IN
- Steve Kreisler, Potomac, MD
- Mary Ann Lawler, Dearborn, MI
- Paul McElroy, Winston-Salem, NC
- Theodore Perros, Washington, DC
- Lovella Richardson, Knoxville, TN
- Iris Sosa, Fontana, CA
- Robert Stokes, Kemp, TX
- Bruce Twomley, Chair, Juneau, AK

Panel Members Absent

- Helen Curol, Lakes Charles, LA
- Clifford McKenzie, Del City, OK
- Joseph Meissner, Cleveland, OH
- David Terrazas, Vice-Chair, Santa Cruz, CA

Staff Present

- Inez E. De Jesus, Program Analyst & Note taker

Welcome/Announcements/Review Agenda

Chair Bruce Twomley opened the meeting by welcoming everyone.

An announcement was made that James Abraham will no longer be serving on this issue committee; he has been selected to participate in the newly established, Communications Issue Committee. The MLI Issue committee is now composed of 16 members and this will affect a change in the quorum.

Roll Call (Quorum=8)

Quorum was met.



Joint Committee Report

Chair stated that he was finalizing the Monthly Report due to the Joint Committee today and that a copy of the report will be shared with the entire committee and Program Owners. **(Action item for Analyst De Jesus)**

Chair also stated that his report will include the program owner's response to the National Women's Law Center and issues raised by the committee with respect to the Low Income Tax Clinics (LITC's) surveys and bilingual brochures previously addressed by the committee. Mills asked if the committee had reviewed the IRS' responses concerning the LITC Surveys and bilingual brochures. The Chair thanked Raymond Mills and other program owners for their efforts in providing their responses but noted that the full committee had not yet seen them. Therefore, the Chair proposed we put the matter over to the next meeting for any comments from the committee. **Action item for the next agenda.**

Review/Approve Previous Meeting Minutes

The January 11, 2005 minutes were approved by consensus.

Ray Mills clarified that the final letter to the National Women's Law Center will be mailed to the TAP Florida Office by no later than Friday, February 11, 2005; it is to be distributed by the TAP Staff and copies will be sent to the entire committee as well. **(Action item for Mills/De Jesus)**

3 MLI Project Teams- Charters and Assignments

Mills gave a brief overview of the draft "TAP MLI Issues Team Charter" – he promised to send it out electronically to the TAP Program Analyst for distribution to all after this call. **(Action item for Mills/De Jesus)**

In summary, these were the areas Mills highlighted to the panel:

- The **Purpose** of the teams is to work with the IRS MLI Strategy Office to support strategies and operational priorities to facilitate IRS compliance with Executive Order 13166 which mandates federal agencies to provide meaningful access to products and services to persons with Limited English Proficiency (LEP).
- The **Goal** of the teams is to provide support for IRS MLI improvement projects that focus on obtaining LEP feedback, developing a standard ESL (English as a Second Language) tax curriculum, and assisting in the development of products for LEP taxpayers. The three teams are:
 1. **FEEDBACK TEAM:** Obtaining grass-roots, "frontline" feedback from LEP taxpayers about IRS MLI products and services.
 2. **EDUCATION TEAM:** Develop a standard basic tax curriculum for use in ESL programs and Stakeholder educational programs (USCIS, DOE, DOJ)
 3. **PRODUCT DEVELOPMENT TEAM:** Providing assistance in the development of new IRS MLI products and services.
- **Membership Leadership Cadre Team:** will consist of the MLI Program Owner, TAP MLI Program Manager, TAP MLI Chair, and the TAP MLI Vice-Chair. These will provide oversight for the three teams. Team membership will include the other at-large members of the TAP MLI Issues committee. The MLI Strategy Office will provide overall program management for the three teams. The responsibilities of this office will primarily be "working with the teams to develop key milestones to address their identified areas of focus" as well as approve the agenda, and facilitate the preparation of meeting minutes. In addition, facilitate an on-going, two-way communications between MLI Strategy Office, the teams, and outside stakeholders.
- **The TAP MLI Issues Committee:** will be "working with the teams to and accomplish strategic goals."
- **Each TAP MLI Issues Team is responsible for:**
 1. Clearly defining team objectives, goals and deliverables.
 2. Developing a timeline for completion of action items and deliverables.



3. Developing a mechanism for gauging success of team initiatives.
 4. Identifying risks and mitigating actions associated with the implementation of team initiatives.
- **Each TAP MLI Issues team member is responsible for:**
 1. Communicating MLI and individual Team strategies to the general committee.
 2. Supporting the development of mechanisms to track the success of team initiatives.
 3. Working with their team members and the general committee to identify risks and mitigating actions associated with the implementation of their initiatives.
 - **Method of Operation, Sources for Team Issues, Representation at Meetings, Decision Making Process, and the Updating of the Charter** was also briefly highlighted by Ray Mills.

Chair Twomley inquired on behalf of the committee, when will we know which team we have been assigned to? Ray Mills responded by sharing that he had received from Inez a coordinated List of the Members' Skills & Interests and a List of the Members' Preferences for which team they wanted to serve on. The next step would be to match members according to their skills level to a team. **Action item for De Jesus:** Mills requested that Inez coordinate a teleconference meeting for Friday, February 11, 2005, at 1:30 pm Eastern Time to finalize the team roster. Participants will be: Mills, Stevens, Ferree, Twomley, Terrazas, and De Jesus.

DFO Ferree inquired if everyone had responded and Inez shared that she had not heard from the following:

Regarding Members' individual skills: Jones, Kreisler, and McKenzie.
Regarding preferences of which team to work on: Lawler

Action item for De Jesus: Re-send email to Steve Kreisler dated December 1, 2004 requesting information on Job titles, Skills, and Interests, since he has been experiencing computer problems.

Jones was on this call and McKenzie will be reminded again after this meeting by Inez. Lawler promised to follow-up on this after this meeting.

Inez inquired from the Program Owners if they had had time to review an email she recently sent out regarding Issue # 3251, Outreach to ESL Taxpayers Linking Paying Taxes to Retirement, which was received by the TAP Area 6 Committee, and they wanted to know if the issue should be handled by the MLI Issue Committee.

Jerald Fireman informed everyone that he was the individual that had made the suggestion to his area committee. Sharese Stevens responded by stating that this ties in perfectly with the brochures, "Why Should I Pay Taxes?" developed by the MLI Strategy Office at a tax forum last year. After a brief discussion, it was decided that this issue will be accepted and worked by this committee. **Action Item for Staff:** Make arrangements to have Issue # 3251 re-assigned to MLI.

Face-to-Face Meeting – Planning Dates/Location

Ray Mills shared that he proposes that the face-to-face meeting be tied in with an upcoming Tax Forum. DFO Ferree stated that at this point, the TAP was not sure if it would be participating this year with the Tax Forums due to funding issues. Currently the MLI Meeting calendar reflects that June 24 and 25, 2005 (Friday and Saturday) has been set aside by this committee for this event.

Mills highlighted that the first Tax Forum is scheduled for June 28-30, 2005 (Tuesday-Thursday) in San Francisco, California. He expressed that the Asian population and language issue is relevant to the multilingual initiative incentive.



Iris Sosa shared that her Area Committee 7 has already scheduled their face-to-face meeting for June 30-July 1, 2005 in San Francisco.

Mills envisions that as this committee has done in the past (last year's face-to-face took place in Brooklyn, NY) representatives from the Low Income Tax Clinics (LITC's) and USCIS (United States Citizenship & Immigration Services) should be invited.

DFO Ferree shared that there is a TAP Master Calendar which she will be sharing with Ray Mills's information on how he can access it, for future planning purposes. **Action item for Ferree.**

After the committee discussed different scenarios, Ray Mills requested that this be an **agenda item for the next meeting**. In the interim, DFO Ferree and Mills will be fine tuning the logistics and report back to the committee next month. **Action item for Ferree/Mills/De Jesus.**

Closing Assessment

Perros shared information that he had sent to Inez to forward to the Area 2 Committee, regarding an article that appeared in the Washington Post on February 6, 2005, titled "A Taxing Challenge". Perros expressed his views regarding monies spent on translating of IRS forms and requested that this article be read by everyone. **Action item for Inez:** share this article with both Area 2 and the MLI issue committee, since many expressed an interest to read it.

DFO Ferree reminded everyone that the next call will be on March 8, 2005 at 2:30 PM Eastern Time.

Chair Twomley stated that he looked forward to the materials that will be sent out by Ray Mills.

Chair adjourned the meeting.

***These minutes were approved by the TAP MLI Issue Committee by consensus on March 8, 2005.**



Multilingual Initiative (MLI) Committee Meeting Minutes

January 11, 2005

Designated Federal Official (DFO)

- Nancy L. Ferree

MLI Program Owner(s)

- Toni M. Cross
- Sharese A. Stevens
- Raymond G. Mills

Panel Members Present

- Helen Curol, Lakes Charles, LA
- Jerald Fireman, Edmonds, WA
- Dorothy Havey, Lincolnville, ME
- José Irizarry, San Juan, PR
- Steve Kreisler, Potomac, MD
- Mary Ann Lawler, Dearborn, MI
- Paul McElroy, Winston-Salem, NC
- Clifford McKenzie, Del City, OK
- Theodore Perros, Washington, DC
- Iris Sosa, Fontana, CA
- Robert Stokes, Kemp, TX
- David Terrazas, Santa Cruz, CA, Vice-Chair
- Bruce Twomley, Juneau, AK, Chair

Panel Members Absent

- James Abraham, Gahanna, OH
- Delford Jones, Griffith, IN
- Joseph Meissner, Cleveland, OH
- Lovella Richardson, Knoxville, TN

Guests

- Peter Coddington, Bowne Global Solutions, Translations
- Greg Holt, Government Markets Manager, Language Line Services

Staff Present

- Inez E. De Jesus, Program Analyst & Note taker

Welcome/Announcements/Review Agenda

MLI Chair Bruce Twomley opened the meeting by welcoming everyone.



Twomley addressed Theodore Perros' email, "Report on IRS Publication 519, U.S. Tax Guide for Aliens" and indicated that Perros could discuss later on if the time permits.

Roll Call

Quorum = of 9 was met. (13 members were present)

Review/Approve Previous Meeting Minutes

For the record, previous committee's minutes from September 17, 2004 were approved by consensus on September 30, 2004 and the Notes taken on November 5, 2004 at the TAP Annual Meeting, are not regulated by FACA (Federal Advisory Committee Act).

Program Owner's Updates

Ray Mills shared conversation he recently had with Chair Twomley whereby they agreed the panel needs to be more pro-active with issues that affect Limited English Proficient taxpayers. Mills made a proposal for the establishment of 3 teams which were accepted by the panel after discussion and these are:

#1 "MLI Feedback Team" (ID#3303)

This team will be charged with getting grassroots feedback from Limited English Proficient (LEP) individuals on IRS Products and Services that relate to LEP's. The MLI Office will provide the products and services for review. A presentation of the LEP Needs Assessment will be provided to the group.

#2 "MLI Education Team" (ID#3306)

This will be a follow-up to the previous TAP MLI Issue Committee's ESL (English as a Second Language) Program directed by Sally Sandy, from the Parkway Area Adult Education and Literacy, St. Louis, MO. This team will be charged with the development of a standard basic tax curriculum for use in:

- English as a Second Language (ESL) program(s)
- Stakeholder educational programs (USCIS, DOE, DOJ)

#3 "MLI Product Development Team" (ID#3307)

This team will be pro-active in assisting with the translation of products in other languages as identified or agreed upon by the Program Owners. (Last year there was the "Bilingual Brochures").

Brief discussion followed regarding a relationship between Teams 1 and 3 and that most likely there will be cross-functional activities among all 3 teams.

Sharese Stevens reminded everyone that the Multilingual Initiative Program Office is mandated by Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency. The MLI is to ensure that LEP customers have the products and services they need to understand and comply with tax responsibilities. A "LEP Needs Assessment Process" is currently being reviewed. Mills had shared some of this information via a Power-point Presentation during the TAP Annual Meeting in November in Washington, DC.

Next Steps/Action Item:

1. Ms. Stevens will be sending to everyone information on the LEP Needs Assessment as it relates to the 3 new teams, as well as details on the 3 new teams.
2. Once this is shared, Inez will be sending out an email requesting members' preferences on which team they would want to be engaged in. (Order of preference will also be requested)
3. Inez will coordinate the responses and share via email to all concerned.



Office Reports

None.

Action Items

Previous invitation for a panel member to attend the MLI Executive Council Meeting, January 2005, will not be extended due to budget and internal privacy issues. (Mills stated that the MLI Strategy office will not be available next week since they will be attending this meeting.)

Future Meeting Planning

Chair shared that during the December 2004 Joint Committee meeting he learned that due to budget concerns each committee will be allowed to have only one face-to-face meeting this year, and not two as previously planned. Also, DFO Ferree requested that the panel re-consider not holding a meeting on a Sunday. After brief discussion, agreement was made that meeting will not be held on a Sunday; the March meeting will be cancelled, and the actual dates and location for the face-to-face meeting will be based on the direction and guidance from the Program Owners. **Follow-up Action item for Cross/Mills-on location/dates for committee’s face-to-face meeting.**

- DFO Ferree shared that what has worked in the past is travel date Thursday, meeting on Friday and half a day on Saturday, and travel back home on Saturday afternoon.
- DFO Ferree requested that the panel re-visit the time frame for the MLI teleconference meetings which resulted in that beginning on February 8, 2005, these meetings will start at 2:30 PM ET instead of 3:00 PM ET. (Second Tuesday of every month) **Action item:** Inez will distribute an updated Tentative Meeting List for the remainder of this fiscal year to all.
- Mills suggested that perhaps aligning the face-to-face meeting with the upcoming 2005 IRS Nationwide Tax Forums might be an option. The MLI Strategy Office will be at these events. Mills shared the following Tax Forum’s dates and locations with the panel:

<u>City</u>	<u>Dates</u>
San Francisco, CA	June 28-30, 2005 (Tuesday-Thursday)
Houston, TX	July 12-14, 2005
Atlanta, GA	July 26-28, 2005
New York, NY	August 9-11, 2005
Las Vegas, NV	August 23-25, 2005
Chicago, IL	August 30-Sept 1, 2005

- Agreement was reached that the face-to-face meeting should be an involvement with a grassroots group and working meeting as it has been in the past.

Low Income Tax Clinic (LITC) Conference Feedback

Chair Twomley expressed gratitude for the reports provided by both Paul McElroy and Robert Stokes when they attended the second Annual LITC conference in Philadelphia, PA, December 7-9, 2004. Both McElroy and Stokes expressed the following:

- Basic information should be provided to a new attendee on what a LITC is, and what activities they provide for taxpayers.
- Attending conference was very educational; learned about the problems low-income taxpayers and ESL’s have regarding credits and refunds that they are due.
- TAP Chair Gwen Handelman was given the opportunity to introduce the members of TAP and explain what TAP is and requested input from LITC’s on helping TAP to meet its mission. Ms. Handelman volunteered to report to TAP on the substantive issues raised at the conference.
- Worthwhile experience.



Status of Prior Action Items – Mills

Mills reported that:

- He is finalizing the response to the National Women’s Law Center and will report back by the next meeting on the status of this. (Account of the IRS’ initiatives to date regarding the prioritization of the translation of key documents.)

Public Input

Both guests heard about this meeting from an ad that appeared in the Corporate Calendar for the IRS. Peter Coddington from Bowne Global Solutions, which handles the translating of documents, is a contractor who stated that he is currently attempting to work with the IRS. (He has no established contract with the IRS) He mentioned Denise Fayne who is in charge of Forms and Publications. Mr. Coddington shared that he is interested in the multilingual initiative program.

Greg Holt is from Language Line Services and was interested to hear about what this committee was all about.

Closing/Assessment

James Abraham signed in on the call as it was ending and he was advised to review the upcoming meeting minutes.

Before closing, Perros briefly shared a project that he has also shared with his area committee regarding “Improving Communications to Taxpayers.” Perros has reviewed Publication 519 and shared his views regarding the translation of IRS publications as not being the best way to use taxpayer’s monies. Both DFO and Program Owner agreed that this was not a MLI issue and it would be best addressed in an area committee, although Program Owner Cross commented the issue would likely come to her in any event. Chair Twomley concurred but thanked Mr. Perros for sharing the information and commented that Mr. Perros’ analysis was consistent with the MLI Issue Committee’s original recommendation to the IRS that money now spent on translating tax forms would be better spent on translating basic information and direct services to LEP taxpayers. Mr. Perros responded that he supported that approach.

Chair Twomley adjourned the meeting and thanked everyone for participating on this call.

The next teleconference meeting will be on Tuesday, February 8, 2005 at 2:30 PM Eastern Time.

***These minutes were approved by the TAP MLI Issue Committee on February 8, 2005, by consensus.**