



2009 Meeting Minutes Multi Lingual Initiatives (MLI) Issue Committee

- November 12, 2009
- October 8, 2009
- September 10, 2009
- August 13, 2009
- July 9, 2009
- June 11-12, 2009
- May 14, 2009
- April 9, 2009
- March 12, 2009
- February 12, 2009

**MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE
Teleconference
November 12, 2009
2:00 pm EDT**

Program Owner

- Lee, Cynthia

Designated Federal Official

- Knispel, Marisa

Committee Members Present

- Bensen, Milissa
- Chapman, Benson
- Colon-Sacarello, Rafael
- Gustafson, Joan
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne

Committee Members Absent

- Brown, Kimberly
- Kapugi, Louis
- Rodriguez, Al
- Toomer, Karla



TAP Staff

- Babb, Rose
- Odom, Meredith

Other Attendees

None

Welcome

Gustafson welcome everyone to the meeting.

Program Owner

Lee thanked the members for all the work they have done this year and indicated that she enjoyed working with them. She noted that she had not received any completed Stakeholder’s Survey that were distributed to the members to complete with local organizations. Gustafson indicated that she took the Survey to her nearby community college. The contact there found the Survey interesting but has not completed it. Sacarello also experienced lack of interest in completing the Survey. No one wants to cooperate. Rasmussen has a Survey completed and will be mailing it to Lee.

Knispel asked members who are not returning or those who are joining other Issue Committees next year to send the completed surveys to Lee whenever possible. .

Annual Report

Knispel indicated that all TAP committees need to provide an Annual Report to the TAP Chair at the end of the year. This Committee Annual Report is used by the TAP Chair to compose his TAP Annual Report which is addressed to National Taxpayer Advocate Nina Olson. For the MLI Issue Committee, Al Rodriguez as chair of the Committee is responsible to write the Report. Knispel encouraged the members to send comments or their assessment of our Committee this year to Rodriguez.

Knispel also noted that MLI will not function as a committee next year but that it might join the Forms and Publications Issue Committee. Lee concurred and said that this was done in order to streamline the process as well as the funds required. The Program Manager will be Patty Wagner.

Public Participation

None

Closing: Knispel thanked Bensen, Brown, and Rodriguez for their contribution to TAP during the past three years and urged them to keep in touch with the TAP.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE

**Teleconference
October 8, 2009
2:00 pm**

Program Owner

- Cheeks, Maria
- Lee, Cynthia
- Oyefeso, Nikki

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Brown, Kimberly
- Chapman, Benson
- Gustafson, Joan – Vice Chair
- Levine, Howard
- Rasmussen, Anne

Committee Members Absent

- Benson, Milissa
- Colon-Sacarello, Rafael
- Kapugi, Louis
- Mackie, Wayne
- Rodriguez, Al – Chair
- Toomer, Karla

TAP Staff

- Babb, Rose
- Knispel, Marisa

Quorum not met.

Welcome

Knispel welcomed everyone and announced that in Rodriguez's absence, Gustafson would lead the meeting. Also, due to lack of quorum, the last meeting's minutes were not approved.

Program Owner

Cheeks had no updates but reminded everyone that all recommended changes to the Publication 17 and the Publication 850 in Spanish were adapted. Also, as recommended by the Committee, there were no changes made to Publication 596SP.



Update on the Stakeholder Survey

Knispel asked all members present if they had completed the Stakeholder Surveys provided to them and returned to the MLI Office. Some members indicated that they found it difficult to follow up on the organizations' lead contacts provided. For example, Brown said that some organizations were a great distance from her home.

Knispel urged members to try their best in reaching the organizations listed by the MLI Office and/or contacting other local organizations not listed. Even one completed Survey would be of great help to this Office, said Knispel.

Also, Knispel informed everyone that Rodriguez is responsible for writing our Committee's Annual Report. This Report will eventually be integrated as part of the TAP's Annual Report that TAP Chair Charles Davidson is responsible for writing.

Public Participation

None

Closing

Knispel will send an email to all members to remind them to return the completed surveys in the envelope provided. She also thanked Gustafson for chairing this meeting.

Morizio thanked members for their participation.

The next teleconference will be November 12, 2009 at 2:00 pm ET.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE

Teleconference

September 10, 2009

2:00 pm EDT

Program Owner

- Lee, Cynthia

Designated Federal Official

- Knispel, Marisa

Committee Members Present

- Bensen, Milissa
- Chapman, Benson
- Levine, Howard
- Rasmussen, Anne
- Rodriguez, Al
- Toomer, Karla

Committee Members Absent

- Brown, Kimberly
- Colon-Sacarello, Rafael
- Gustafson, Joan
- Kapugi, Louis
- Mackie, Wayne

TAP Staff

- Babb, Rose
- Odom, Meredith

Other Attendees

None

Quorum met

Welcome

Rodriguez welcomed everyone to the meeting. He asked if anyone had a change or a comment on the meeting minutes for July and August. The minutes for the July meeting were approved. A change in the attendance list is needed on the August minutes. Pending this change, these minutes were also approved. Knispel will make the change.

Subcommittee Report

Publications Subcommittee

Rasmussen reported that the subcommittee completed the review of Publication 596SP. The Publication was very well written and the Subcommittee made no changes.



Program Owner

Lee stated that all Committee members should have received the Stakeholder Survey along with the postage-paid envelope in the mail. Next Monday, she will send a list of organizations via e-mail that the members can use to complete this Survey. The deadline for this assignment has been extended until October 30th.

Lee also mentioned that Cheeks would like to thank the members who reviewed Publication 596 SP. Cheeks could not attend this meeting but is grateful for their work.

Public Participation

None

Closing: Rodriguez thanked all members of the Committee for their diligence in completing their assignments. He asked that everyone contribute their time in helping Lee with the completion of the Stakeholder Survey.

The next teleconference will be October 8, 2009 at 2:00 pm.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE

**Teleconference
August 13, 2009
2:00 pm EDT**

Program Owner

- Lee, Cynthia

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bensen, Milissa
- Brown, Kimberly
- Chapman, Benson
- Kapugi, Louis
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne

Committee Members Absent

- Colon-Sacarello, Rafael
- Gustafson, Joan
- Rodriguez, Al
- Toomer, Karla

TAP Staff

- Knispel, Marisa

Welcome

In Rodriguez's absence, Vice-Chair Brown led the meeting. Since some of the members joined late, the minutes were not approved as there was no quorum at the beginning of the meeting.

Program Owner

Lee thanked those who completed the survey after watching the DVD. She indicated that the deadline to complete this survey was extended until September 15th from the original date of August 31st.

Lee also spoke of the Stakeholder Survey that will be delivered to all Committee members along with the self-addressed stamped envelope to return to the Program Office. This Survey is to be distributed to organizations in the members' areas for the IRS to gain knowledge of the services needed by different communities mainly dealing with the Limited-English Proficient community.

Lee spoke of providing a list of VITA sites in different areas but the problem is that most of these sites are closed during summertime and resume their work in the fall. Lee and Oyefeso will revise the list and contact Knispel with leads for the members to distribute this Survey.



Subcommittee Report-Out

Publications Subcommittee

Rasmussen indicated that she had received a response on the review of the Publication 596SP. Rasmussen asked the rest of subcommittee members to provide their input on this publication to her as soon as possible.

Outreach Subcommittee

Brown thanked those who replied to Lee on the DVD survey and also encouraged those who have not yet replied to do so.

Closing: Brown thanked everyone for attending this meeting. The next teleconference will be September 10, 2009 at 2:00 pm.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE
Teleconference
July 9, 2009
2:00 pm

Program Owner

- Cheeks, Maria

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Brown, Kimberly
- Chapman, Benson
- Gustafson, Joan
- Kapugi, Louis
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne
- Rodriguez, Al

Committee Members Absent

- Bensen, Milissa
- Colon-Sacarello, Rafael
- Toomer, Karla

TAP Staff

- Babb, Rose
- Knispel, Marisa
- Odom, Meredith

Welcome

Rodriguez welcomed everyone to the call and asked for approval/disapproval of the minutes from our June meeting. The minutes were approved.

Subcommittee Report-Out

Publications Subcommittee

Rodriguez indicated that the review of Publication 17 SP was completed. Rasmussen has collected recommendations on items to be added to Publication 850 (Glossary). Chapman has recently sent her a list of recommended items which he compiled by reading the glossary that appears in the National taxpayer Advocate's Annual Report to Congress.

Cheeks said that her team will have a group meeting on the 10th to discuss the recommendations received so far and decide which will be included in the Publication.



Rodriguez thanked Rasmussen and the subcommittee for their work.

Outreach Subcommittee

This subcommittee is still waiting receipt of the revised DVD for review. Their next assignment also includes contacting their local organizations to conduct the Stakeholder Survey and mailing the completed surveys back to the Program Owner for review. As of today, no one has received the copies since the Survey is being revised. Cheeks confirmed this and indicated that she will remind the MLI Office to send out the copies as soon as possible.

Closing: Rodriguez thanked everyone for attending this meeting. The next teleconference will be August 13, 2009 at 2:00 pm.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE
Face to Face Meeting- Dallas, TX
June 11 and June 12, 2009
8:30am - 5:00 pm CST

- Thursday, June 11, 2009
- Friday, June 12, 2009

Thursday, June 11, 2009

Program Owner

- Cheeks, Maria

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bensen, Milissa
- Chapman, Benson
- Colon-Sacarello, Rafael
- Kapugi, Louis
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne
- Rodriguez, Al
- Toomer, Karla

Committee Members Absent

- Brown, Kimberly
- Gustafson, Joan

TAP Staff

- Babb, Rose
- Knispel, Marisa

Welcome

Rodriguez opened the meeting and indicated that the meeting might be extended to allow the arrival of the Program Owners and members who due to the bad weather had been held at airports.

The meeting started with a presentation by Maria Cheeks, Section Chief of Virtual Translation Office. She talked about the mission of this Office and their current projects. Their mission is threefold: 1) to improve the quality and quantity of the translated documents available to the LEP community, 2) to develop, coordinate and review written material to achieve accurate and understandable translations of written tax information and outreach materials, and 3) to ensure high standards of quality, consistency and efficiency in the production of translated tax products and the outreach materials.



Cheeks mentioned that:

- The VTO has recently distributed 11,000 copies of Publication 17 in English to taxpayers.
- Eleven new chapters were added to the Spanish Publication 17.
- The IRS' Criminal Investigation has joined the VTO to conduct outreach in communities.
- The VTO is also working with the Taxpayer Advocate Service to provide feed back on the products developed by the latter organization.
- Their new project is that of reviewing and adding/deleting terms found in the Glossary of tax terms (known as Publication 850). This Publication is also used by IRS employees to refer to tax terminology when speaking with LEP taxpayers.

Cheeks requested the Publications Subcommittee assist the VTO with this project. She asked the members to review the current Publication 850 and suggest changes. She also requested they review Publication 596, Earned Income Tax Credit that was recently translated into Spanish.

Cheeks was very grateful for this Subcommittee's work on the review of Publication 17 SP and so, she presented its members and Analyst Knispel with a Certificate of Appreciation for their work.

Subcommittee Breakout

Members worked with their respective subcommittees to discuss their respective assignments.

Public Participation None

Closing

Rodriguez closed the meeting on time as the weather prevented the arrival of those who were absent on the first day.

Friday, June 12, 2009

Program Owner

- Cheeks, Maria
- Lee, Cynthia
- Oyefeso, Nikki

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bensen, Milissa
- Colon-Sacarello, Rafael
- Kapugi, Louis
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne
- Rodriguez, Alberto
- Toomer, Karla



Committee Members Absent

- Brown, Kimberly
- Gustafson, Joan
- Chapman, Ben

TAP Staff

- Babb, Rose
- Knispel, Marisa

Welcome

Rodriguez welcomed everyone to the second day of the meeting and thanked those, who in spite of the harsh weather and travel conditions were able to join us. Gustafson, for instance, was held at the airport in Houston unable to fly into Dallas. The chair and the rest of the members appreciated her persistence in trying to make the meeting.

Program Owners Lee and Oyefeso showed the participants a DVD in Spanish with English subtitles on the responsibility of paying taxes. The video teaches recent immigrants and those who are new to the American taxation system how to pay their tax due and why taxes are important. Lee also distributed a survey to be conducted after viewing the video.

After the viewing, the members had a chance to critique the video and suggested a few changes to it. Then, the Program Owners conducted the survey with the members and collected their answers.

They also spoke of another survey, the Stakeholder Survey that addresses local organizations serving the LEP communities to learn if IRS products and services that target this population are meeting their needs and to ascertain if additional products are required to meet their needs. They provided a copy of this Survey to each participant and requested their help in outreaching the organizations in their area and in collecting the answers. Oyefeso indicated that to accomplish this, they will mail out a small number of Survey copies to each member with a self-addressed stamped envelope that they can use to return the completed surveys to the MLI Office. The deadline for this assignment is August 31st.

Lee commented on the Outreach Subcommittee's recent proposal that included the names of organizations and their key contact. She indicated that MLI has called these contacts and they were able to establish a partnership with some of these organizations. They were very grateful to the Subcommittee for this work.

Closing

DFO Morizio thanked the members for their work and dedication and requested a round robin to allow each member to provide his or her comments on the TAP and the MLI Issue Committee.

Rodriguez indicated that this is his last year as a TAP member and has enjoyed his three-year membership.

Closing Remarks

Rodriguez thanked all for their participation.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE

Teleconference

May 14, 2009

2:00 pm EDT

Program Owner

The Program Owner was absent

Designated Federal Official

- Knispel, Marisa

Committee Members Present

- Bensen, Milissa
- Brown, Kimberly
- Chapman, Benson
- Colon-Sacarello, Rafael
- Gustafson, Joan
- Kapugi, Louis
- Levine, Howard
- Mackie, Wayne
- Toomer, Karla

Committee Members Absent

- Rodriguez, Al
- Rasmussen, Anne

TAP Staff

- Babb, Rose
- Knispel, Marisa

Other Attendees

None

Welcome

Knispel welcomed everyone to the call. March minutes were approved.

Subcommittee Report Out

Publications Subcommittee- The members participating in the review of Publication 17 SP (Spanish) indicated that they have found no technical errors in the translation of this publication, only a couple of misspelled words in their respective chapters.

Outreach Strategy Subcommittee- Brown indicated that the Subcommittee did not meet this month. Rodriguez promised to forward to her some information to add to the recent Subcommittee's proposal. Once she receives this information from Rodriguez, she will set up another meeting. Knispel indicated that this information might be the contact information on the organizations listed as part of their proposed recommendations. According to Cynthia Lee, the name of a contact person and a phone number is necessary for each.



Preparation for Face to Face Meeting Knispel indicated that she had shared the agenda for this meeting on previous occasions with the members via email and she hopes that it will be a substantive and productive meeting. She also indicated that meeting face-to-face is the optimal way for committees to work but unfortunately, it is not possible. She urged the members of both subcommittees to use this upcoming meeting to request clarification on their assignments if they feel is needed.

Knispel also reminded everyone that the meeting will take place at the IRS Building in Dallas and was told that this is a very convenient location. Lastly, she reminded them that they could find a copy of the meeting's agenda in TAPSpace.

Public Participation

None

Closing Remarks

Knispel thanked everyone for attending.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE

Teleconference

April 9, 2009

2:00 pm EDT

Program Owner

- Lee, Cynthia

Designated Federal Official

- Knispel, Marisa

Committee Members Present

- Bensen, Milissa
- Chapman, Benson
- Mackie, Wayne
- Rodriguez, Alberto
- Toomer, Karla

Committee Members Absent

- Brown, Kimberly
- Colon-Sacarello, Rafael
- Gustafson, Joan
- Kapugi, Louis
- Levine Howard
- Rasmussen, Anne

TAP Staff

- Babb, Rose
- Knispel, Marisa
- Odom, Meredith

Other Attendees

- Turner, Ava (LITC Program)

Welcome

Rodriguez welcomed everyone to the call. Since there was no quorum, minutes of the last meeting were not approved.

Program Owner Presentation

Lee indicated that she and her team have reviewed the Outreach Strategies Subcommittee's proposal. She will like to review some of the contacts with Kim Brown and the other members. She indicated the Program Owners may share with our Committee a Survey the MLI Office has recently developed.



Face to Face Meeting

Rodriguez reminded everyone that their travel arrangements were made for everyone who responded to Babb and asked Babb to send a email reminding those members who did not respond to the original request for travel preferences.

Low Income Tax Clinics (LITC) - ESL Program

Knispel introduced Ava Turner and asked her to explain the LITC English as a Second Language Program and how they help the non-English speaking community. Turner explained that LITC ESL clinics are responsible for educating ESL taxpayers on their tax rights and tax responsibilities. ESL clinics are located in areas that have a large population of ESL taxpayers. The Program personnel search organizations that could conduct workshops or meetings for members of the community and who would assist people who have tax problems. Some organizations do tax preparation but not all. So, the bulk of their work is assisting taxpayers with tax controversies.

A survey that was developed in coordination with the MLI Office, Turner explained, and will be distributed to 162 clinics. It was translated into five languages Chinese, Korean, Russian, Spanish, and Vietnamese

Closing

Next meeting May 14, at 2:00pm, ET.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE

Teleconference

March 12, 2009

2:00 pm

Program Owner

- Lee, Cynthia

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bensen, Milissa
- Brown, Kimberly
- Chapman, Benson
- Kapugi, Louis
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne
- Rodriguez, Alberto

Committee Members Absent

- Gustafson, Joan
- Colon-Sacarello, Rafael
- Toomer, Karla

TAP Staff

- Babb, Rose
- Knispel, Marisa (Absent)
- Odom, Meredith

Other Attendees

- Oyefeso, Nikki
- Rolon, Juan (LTA- New Mexico)

Welcome

Rodriguez welcomed the participants and asked if anyone had any comments on the minutes from the last meeting. They all accepted the minutes as presented.

Subcommittee Report-Out:

Publications Subcommittee

Rasmussen said that each member of the Subcommittee was assigned chapters from the Publication 17 in Spanish to review/revise. They agreed to have their assignments completed by the face-to-face meeting in June. Any changes or recommendations will be written on a worksheet that Rodriguez provided us for this purpose.



Lee said that VTO (Virtual Translation Office) is separate from MLI (Multilingual Initiative) Office. MLI works with the Outreach Strategy Subcommittee while the VTO works with the Publications Subcommittee

Outreach Strategy Subcommittee

Rodriguez said the members suggested contacting local organizations to include the content of the DVD with a link to their website rather than mailing out the DVD for distribution.

Oyefeso said there will be organizations that would benefit from distributing the DVD to their customers and that there are certain organizations that will include the suggested link on their website as well.

Rodriguez said he will contact organizations in South Florida and will include these contacts to the proposal.

Morizio said that the TAP Director approved our face-to-face meeting dates and location. The meeting will start on June 11th (full day, 8:00 am - 4:30pm) and half- day on June 12th, (8:00am - 12:00 PM). Travel will be on the 10th and the afternoon of the 11th. Morizio also requested that members not make any arrangements to leave before the meeting concludes.

Guest Speaker

Juan Rolon, LTA (Local Taxpayer Advocate) from New Mexico is acting as LTA in Brooklyn. He informed TAP members of his portfolio duties in the TAS organization. He informed the members of his participation with the BCAST-Bilingual Case Advocate Study Team. His team meets once a year and is comprised of managers, case advocates and a few analysts. This team works on bilingual cases assigned to TAS.

Closing

Rodriguez thanked everyone for their participation and reminded them to inform Knispel or Odom if anyone will be absent from a meeting prior to the meeting.

The next teleconference will be April 9th at 2:00pm.



MULTI-LINGUAL INITIATIVES (MLI) ISSUE COMMITTEE
Teleconference
February 12, 2009
2:00 pm EST

Program Owner

- Oyefso, Nikki

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Brown, Kimberly
- Levine, Howard
- Mackie, Wayne
- Rasmussen, Anne
- Rodriguez, Alberto
- Toomer, Karla

Committee Members Absent

- Bensen, Milissa
- Chapman, Benson
- Kapugi, Louis
- Colon-Sacarello, Rafael
- Gustafson, Joan

TAP Staff

- Babb, Rose
- Knispel, Marisa
- Odom, Meredith

Welcome

Rodriguez welcomed all to the meeting and asked if members had any changes to the meeting minutes of December and January. No one had changes and the minutes were approved.

Program Owner Presentation

Oyefeso stated that her office is in the process of conducting focus groups with Chinese, Korean and Vietnamese individual taxpayers as well as small business owners. The MLI Office will provide feedback to the Committee once this project is completed.

Subcommittee Report-Out
Publications Subcommittee

Rasmussen said that the Publication 17 in Spanish is available on the IRS website. The subcommittee has divided up the entire publication and everyone is responsible for reviewing and revising their assigned portion. Rasmussen is responsible for checking the web links to make sure they are correct. Rodriguez provided the subcommittee with a form to be used to track changes on the Publication. The Subcommittee's work on the Publication 17 SP is expected to be complete by the face-to-face meeting in June.



Outreach Strategy Subcommittee

Brown reported that the group has suggested several venues to distribute the MLI DVD. She was unable to write the proposal to be reviewed at this meeting since she still collecting suggestions from the members but one will be written and shared with all at the next monthly meeting.

Face to Face

Knispel invited Linda Rivera from the LITC Office ESL Program to address the Committee.

Morizio indicated that budget analysis indicates that Dallas would be the most inexpensive city to hold the face to face meeting. We also looked at the amount of time needed and we agree that a day and a half of meeting time will suffice (June 11th and half of the 12th). Travel will be on the 10th and on the afternoon of the 12th. MLI Program Owners will attend the meeting.

Closing

Outreach Strategy Subcommittee teleconference will be held first Tuesday March 3 at 2:00pm, EST.

Next MLI teleconference will be March 12, at 2:00 pm, EST.