



## **2006 Meeting Minutes Taxpayer Assistance Centers (TAC) Issue Committee Meetings**

- December 13, 2006
  - November 7, 2006
  - October 3, 2006
  - September 5, 2006
  - August 1, 2006
  - July 11, 2006
  - June 6, 2006
  - May 4-6, 2006
  - April 4, 2006
  - March 7, 2006
- 

### **Taxpayer Assistance Center Issue Committee Meeting Washington DC Wednesday, December 13, 2006 Minutes**

#### **Program Owner**

Estelle Tunley  
Michelle Jones, TAC Analyst  
Shirley Washington, TAC Analyst

#### **Attendance**

Jerry Fireman, Chair  
Robert Haines  
William Matheny  
Jerry Melchior  
Wayne Whitehead  
Doug Wilhelm  
Bruce Zgoda, Vice Chair

#### **Guest**

Carol Hatch, TAS Analyst

#### **Staff**

Judi Nicholas, Designated Federal Official  
Dave Coffman, TAP Analyst  
Marla Ofilas, Note Taker

#### **Opening/Welcome/Announcements**

Judi opened the meeting. Jerry Fireman welcomed the members.

#### **Committee Focus: Milestones, Goals and Objectives**

Estelle reviewed the progress over the past year. A year ago when the committee was formed, the



members met with Estelle and learned of the program owner objectives. Several months later, at the face-to-face meeting in Denver, the members spent time reviewing the publication method guide (PMG) and formulating the initial draft of survey questions for taxpayer assistance center (TAC) customers and employees.

Two subcommittees were formed to accomplish the objectives, the PMG subcommittee and the Customer Experience subcommittee (to formulate the survey). At the Denver meeting, Taxpayer Resolution Representatives (TRR) met with the PMG subcommittee to demonstrate how the PMG is used in the workplace. The subcommittee found that some of the questions asked in the PMG, were not in the appropriate order. The subcommittee members all agreed that the “drop dead” questions should be at the beginning of the tax law category.

The Customer Experience subcommittee also left the Denver meeting with a much clearer vision. The subcommittee later met in Atlanta to work on the TAC customer survey. During the Atlanta meeting, the subcommittee established a goal to ensure the survey results will be statistically valid.

### **Publication Method Guide Subcommittee**

As the subcommittee leader, Bob provided the subcommittee report. Bob thanked Kimberly Chowning, former TAP member, for her hard work on the recommendation. Bob explained that the committee worked on trying to get the disqualifier questions at the beginning of the tax law category.

The subcommittee reviewed the latest draft of the PMG recommendations and agreed with the updates.

**Decision:** The full committee agreed that the PMG recommendations should be forwarded to the program owner.

**Action:** Dave will formalize document and forward it to Estelle.

### **Customer Experience Subcommittee**

As the subcommittee leader, Bruce reported that the subcommittee members completed a test survey at three TAC locations.

Bruce administered the surveys while the taxpayers were leaving the TAC office. He provided some marketing materials as thank-you gifts. Doug added that he participated in the test survey and discovered that the TAC customers were very happy and friendly. Doug suggested that time spent setting up the survey table be included in the estimated daily time needed to administer the survey.

Doug felt that the only problem he had was trying to administer the survey to multiple people at the same time. He also discovered that some people did not complete the second page of the survey. Estelle asked for the preliminary data from the surveys.

**Action:** Dave will provide the preliminary data from the surveys.

Wayne also shared his survey experience. Wayne felt that members, who participate in administering the survey, should dress casually. Wayne wore a suit when he administered the test survey. This may have intimidated some customers.

**Action:** Include a dress code in the survey administrator orientation.

Bruce asked if training will be provided to members that volunteer to administer the survey. Judi imagined that a teleconference would be scheduled and members would be given guidance on administering the customer surveys. Dave noted that 16 members have volunteered to administer the



survey. Dave felt that the survey dates and times will need to be narrowed down to allow members to set their schedules accordingly.

Shirley explained that once all participating members have been recognized, the TAC offices will be contacted to inform them of the survey.

Jerry Fireman thanked the members for all their hard work. Estelle agreed and expressed her gratitude. Jerry reviewed the agenda for the next day.

Judi closed the meeting



**Taxpayer Assistance Center (TAC)  
Issue Committee Meeting  
November 7, 2006  
Minutes**

**Program Owner**

Estelle Tunley  
Shirley Washington  
Michelle Jones

**Designated Federal Official**

Judi Nicholas

**Attendance**

Jerry Fireman, Chair  
Bob Haines  
Bill Matheny  
Jerry Melchior  
Wayne Whitehead  
Doug Wilhelm  
Bruce Zgoda, Vice-Chair

**Absent**

Kimberly Chowning

**Guest**

Carol Dillie Hatch, TAS Research

**Staff**

Dave Coffman, Program Analyst  
Marla Ofilas, Note Taker

**Welcome/Announcements**

Jerry Fireman welcomed the members and reviewed the agenda. Marla took roll and a quorum was met.

**Customer Experience Subcommittee Report**

Bruce reported that the subcommittee is getting ready to conduct a test survey between November 27 and December 1. The survey will include 21 questions and is estimated to last no more than 5 minutes.

There was a general discussion regarding the questions on the survey. Members were asked to send Dave any comments via e-mail.

**Action:** Members will forward their comments on the survey to Dave.

Estelle noted that she did not want the survey questions and results to mirror the research completed by the TAB team. The intent of the survey is to get information on the taxpayer's experience when he or she goes into a TAC office. Estelle would like to use the responses to take action to improve or correct an issue that causes the taxpayer to have a less than positive experience when they visit the TAC.



Judi clarified that the TAB team approached and asked Carol if the committee would consider adding some questions to the survey to gather data on TAC offices.

The committee reviewed the questions on the survey and provided comments. The subcommittee felt that an additional subcommittee meeting is needed to discuss and address the feedback received.

#### **Publication Method Guide (PMG) Subcommittee Report**

Bob informed the committee that he recently e-mailed the members a revised copy of the PMG, which was originally written by Kimberly. Bob asked the committee if the report should include the input from both the tax resolution representatives (TRR) and the TAC committee. Jerry Fireman felt that the report shouldn't include only the input from the TAC committee. Dave asked the committee to submit their comments on the report to him via e-mail.

**Action:** Members will forward their comments on the PMG report to Dave by November 14th.

#### **Program Owner Comments**

Estelle had no further comments.

#### **Annual Meeting Update**

Judi briefly reviewed the agenda for the TAC Committee meeting which will be held in Washington, DC in December.

The committee discussed possible dates for their 2007 face-to-face meeting. The members felt they should schedule their 2007 face-to-face meeting after the survey has been administered. Judi will ensure that the committee will discuss location and dates during the December meeting.

#### **Frequency of Meetings**

Jerry Fireman stated that the Joint Committee would like all committees to review the frequency of their meetings.

**Decision:** The committee decided that, based on the survey and the execution of the survey, the schedule will continue as is (monthly). Changes to this schedule will be made as needed.

#### **Self Assessment**

Jerry Fireman explained that each committee is required to produce a self assessment report, outlining the committee's accomplishments for the year. The report is due by December 31. Because a portion of the report is an assessment of the committee chair, Jerry asked the committee members to provide their comments to Bruce, who will collect the committee's input and provide an anonymous summary to Jerry.

**Action:** Jerry will provide the members a final draft of the self-assessment before December 31.

#### **Closing**

Jerry asked if there were additional comments. No comments were added and the meeting was adjourned.



**Taxpayer Assistance Center (TAC)  
Issue Committee Meeting  
Teleconference Minutes**  
*October 3, 2006*

**Program Owner**

Estelle Tunley

**Designated Federal Official**

Judi Nicholas

**Attendance**

Kimberly Chowning  
Jerry Fireman, Chair  
Bob Haines  
Bill Matheny  
Jerry Melchior  
Wayne Whitehead  
Bruce Zgoda, Vice-Chair

**Absent**

Doug Wilhelm

**Staff**

Marla Ofilas, Note Taker  
Janice Spinks, Program Analyst

**Guest**

Michelle Jones

**Welcome/Announcements**

Jerry welcomed the members and asked if there were any announcements. Estelle announced that Shirley Washington will be retiring and introduced Michelle Jones, member of the Field Assistance staff in Atlanta. Shirley will be working with Michelle, who will be taking Shirley's place.

Roll was taken and a quorum met.

**Customer Experience Sub-committee Report**

The members received a copy of the draft surveys on September 26 via email. The sub-committee met in Atlanta and discussed the customer and employee surveys. The sub-committee is attempting to construct the employee survey so that the data correlates with the customer survey data.

Staff members from the TAS Research office are working with the sub-committee on the surveys to ensure that the final surveys collect the data needed and the sample is large enough to produce statistically accurate data. Estelle stated she would like the team to determine how long it takes an individual to complete the survey. Estelle explained that her concern is not about the validity of the survey but the length of the survey and does not want to scare people away. The sub-committee will discuss testing the surveys at the next call.

**Publication Method Guide (PMG) Sub-committee Report**

Bob explained that Kimberly received comments from Bill Matheny and the TRR's regarding the PMG draft. Kimberly offered to forward the comments to the sub-committee members.



Kimberly informed the committee that she was surprised by the comments she received. The TRR's felt that the revised version of the TLC was too detailed and pulled in too much information from the publications. Kimberly felt it was a reversal from the comments that were provided originally. Jerry wondered if the difference in opinion was based on the experience of the TRR's. Kimberly explained that the comments received were from TRR's that are responsible for creating the PMG. Estelle added that there could be an issue with either the TRR experience level or that they are in the middle of rewriting the PMG, which started in April.

Judi reviewed the next steps and offered to forward the TRR's comments to the sub-committee members. The sub-committee will review the comments and discuss a recommendation during their next teleconference.

**Action:** Judi will forward comments to the PMG draft to the sub-committee members.

Jerry asked the full committee and Estelle to comment on the timeframe for completing the TAC projects. Estelle explained that the Field Assistance PMG team is in the process of updating the PMG and has completed 19 of the 83 TLCs. In addition, the team is trying to incorporate as many suggestions from the TAC committee as they can for the 2006 PMG. The goal is to have the PMG ready by November, in time for Field Assistance CPE training. Estelle wanted the committee to know that the suggestions are being considered even though a formal recommendation has not been submitted. Jerry asked Estelle what the goal is for completing the surveys. Estelle explained that she hoped to have the survey completed in two phases; filing season and off peak season. However, it depends on when the survey is finalized.

Bob asked if the committee could review the work that the TRR's have completed. Estelle felt it wasn't a problem and agreed to share a copy of the TLC's that the committee provided input on.

**Action:** Shirley will send a copy of the completed TLC's to the committee.

#### **Program Owner Comments**

Estelle felt the committee is on target. Having the face-to-face meeting in May really helped to move the process along. Estelle thanked the members for their hard work.

Judi asked Estelle if she was prepared to discuss possible issues to be worked in 2007. Estelle asked if it could be discussed during the November teleconference but did feel once the PMG submits their recommendation, she would like to see the PMG sub-committee members participate with the survey sub-committee to provide support in conducting the survey.

Bob suggested that the PMG sub-committee review other potential issues, for example adding a kiosk in TAC offices. Estelle explained there will be a test effort during the 2007 filing season for self-assisted services in selected TACs; however, the test will be administered by the TAB team. Estelle suggested that the sub-committee continue discussing possible issues during their October 17 sub-committee teleconference.

**Action:** The sub-committee will include "possible issues" on their October 17 agenda.

#### **2007 Administrative Issues**

Judi asked the committee to think about possible dates for TAC committee 2007 face-to-face meeting. Judi explained that new members will not be added to the TAC committee. Deciding on face-to-face meeting dates now will allow more time for the committee to work on their issues at the annual meeting in December.



**Decision/Action:** The committee agreed to continue with the current teleconference schedule. The committee will discuss possible face-to-face dates during their November 7 teleconference.

**Closing**

Jerry thanked the members and the meeting adjourned.

**Next Teleconference is scheduled for November 7, 2006**





## Taxpayer Assistance Center (TAC) Committee Meeting Minutes

September 5, 2006

### Program Owner

- Estelle Tunley
- Shirley Washington

### Designated Federal Official

- Judi Nicholas

### Attendance

- Kimberly Chowning
- Jerry Fireman, Chair
- Bob Haines
- Bill Matheny
- Jerry Melchior
- Wayne Whitehead
- Bruce Zgoda, Vice-Chair

### Absent

- Doug Wilhelm

### Staff

- Dave Coffman, Analyst

### Opening

Jerry welcomed everyone and indicated he had no additional announcements to make. Dave took roll and a quorum was met.

### Publication Method Guide Sub-committee Report

Kimberly is waiting for the Taxpayer Resolution Representative (TRR) feedback. Shirley indicated that she will be receiving information on this later in the afternoon. She'll pass the info on to Dave and Judi as soon as it's received. Judi explained that the PMG sub-committee is ready to make recommendations. Kimberly will draft the recommendations on behalf of the sub-committee. The recommendations will suggest that the PMG be reordered and reworded. In addition, the sub-committee would like to suggest the IRS adopt a more interactive document, rather than a PDF file.

**Action:** Kimberly will send out a draft recommendation prior to the next sub-committee meeting.

### Customer Experience Sub-committee Report

Bruce stated that the sub-committee members met in Atlanta. The members worked on creating two surveys; a customer survey and an employee survey. Bruce is hoping to have a draft survey out to the full committee sometime next week. The customer survey is focused on finding out why a taxpayer visited the center and the information they were hoping to find. Wayne has created a draft employee survey, which the sub-committee will review.



Bob indicated that an email was distributed, listing a number of TAC issues being worked by Area 3. Bob noted that Bruce was not on the list of recipients. Members felt the issues might help the sub-committee when developing survey questions.

**Action:** Dave will forward the email to Bruce.

Jerry asked if the sub-committee discussed the method for conducting the surveys. Bruce explained that the sub-committee is hoping TAP members would actively participate at TAC offices around the country and is also hoping that staff could help coordinate the logistics. The sub-committee would like to conduct the survey as early as October and no later than November. The survey would also be conducted in two stages; off season and during peak tax season.

Judi explained that Tom Beers, Director of the TAS Research Operation, is assisting the sub-committee to ensure the data collected is credible. Tom indicated that in order to get credible data, a minimum of 400 good surveys would need to be collected.

#### **Program Owner Comments**

Estelle had no comments; however, she expressed her appreciation for the hard work of the members who met in Atlanta. Estelle is also looking forward to seeing the recommendations by the PMG sub-committee.

Jerry wanted to know the status of the TAB Phase 2 report, which is due out in October. Estelle explained that she was hoping to send out a copy of the report to the members prior to October; however, the report has not been fully reviewed by IRS officials. Estelle would still like to review the report with the members and is hopeful to have the opportunity to do so in December.

#### **Member Comments**

Jerry asked if there were member comments. No additional comments or questions were asked.

Jerry thanked the members for their participation and closed the meeting.



## Taxpayer Assistance Center (TAC) Committee Meeting Minutes

August 1, 2006

### Program Owner:

- Shirley Washington (for Estelle Tunley)

### Attendance:

- Kimberly Chowning
- Jerry Fireman, Chair
- Bob Haines
- Bill Matheny
- Jerry Melchior
- Wayne Whithead
- Doug Wilhelm
- Bruce Zgoda, Vice-Chair

### Staff:

- Judi Nicholas, Designated Federal Official
- Dave Coffman, Analyst
- Marla Ofilas, Note Taker

### Welcome/Roll Call

Jerry opened the meeting and welcomed everyone. Roll call was done and a quorum was met.

### Publication Method Guide (PMG) Sub-committee Report

The sub-committee had a conference call on July 18 that included IRS staff and the Taxpayer Resolution Representatives (TRRs). The sub-committee felt the TRRs provided them with a better understanding of the daily challenge they face, trying to use the PMG. The sub-committee members all agreed that the elimination questions should be at the beginning of the topic so the interview will not be unnecessarily extended. They also agreed that the TRRs and the telephone representatives should be using the same guide when answering questions. Using the same guide could make it efficient for the IRS to move employees between jobs, with little training and also provide better results to the taxpayers. The sub-committee also looked at specific TLCs (tax law categories) related to the hurricane relief, dependants and filing status.

Shirley explained to the committee that there is a group of TRRs that are looking at the same TLCs. She will provide a report of their findings to the sub-committee.

**Action:** Kimberley will review and prepare a detailed report on the filing status TLC Sunday August 6, 2006. She will also provide a courtesy copy to Shirley.

**Action:** Dave will create and send out an agenda for the next sub-committee meeting.

### TAS Research Results/ Customer Experience Sub-committee Report

The Office of Management and Budget (OMB) was contacted to determine if the customer experience survey was subject to the Paperwork Reduction Act, requiring OMB review and approval. Since the



survey was developed by and will be used by the TAP, the survey is not subject to OMB review and approval.

The TAB team shared the results of a survey that was conducted for the Phase I report; however, the survey is confidential and can not be shared with anyone other than the TAC members. The data provided on walk-in traffic may be useful to the sub-committee.

**Action:** Dave will email the TAB survey results to all members (IRS Service Channel Study).

The TAS research group was contacted to request their assistance in developing a statistically valid sample. Shirley and Dave are gathering information to help the research staff determine a valid sample size. Additionally, it was recommended that the sub-committee review each of the survey questions and ask the following:

- Based on the questions being asked, what information can the sub-committee expect to receive from the survey answers?
- How can that information be used to affect change?

The sub-committee will also need to discuss how the survey will be administered.

Shirley explained that the TAB team had some additional questions they would like to submit to the sub-committee for consideration and possible inclusion in the survey.

**Action:** Shirley will provide the TAB team questions to the sub-committee.

#### **Next Steps:**

- The sub-committee will review the questions on the employee and customer surveys
- The sub-committee will be prepared to discuss ideas on administering the survey
- The timing of the survey will need to be decided
- Questions from the TAB team will need to be reviewed
- The sub-committee will need to ensure that each question is only asking one item. For example, "I am confident that I received complete and accurate responses." A customer could have received complete responses but not accurate responses. How does a taxpayer respond to the statement if they agree with one part but not the other?

The sub-committee members discussed the possibility of holding a face-to-face meeting to work on their survey.

**Decision:** The sub-committee decided to meet on August 31 and September 1 in Atlanta, GA.

**Action:** Dave will email mail the dates and location of the meeting.

#### **Program Owner Comments**

Shirley stated that Estelle wants both sub-committees to continue moving forward. She wants them to understand that, even though they may feel the process is moving slowly, progress is being made.

#### **September TAC Meeting Date**

The next TAC meeting is scheduled for Labor Day. The committee discussed alternative dates.

**Decision:** The TAC committee has decided to move their meeting to Tuesday September 5, 2006.



**Closing**

Jerry thanked everyone and closed the meeting.



## Taxpayer Assistance Center (TAC) Committee Meeting Minutes

July 11, 2006

### Program Owner:

- Shirley Washington (for Estelle Tunley)

### Attendance:

- Jerry Fireman, Chair
- Bill Matheny
- Jerry Melchior
- Wayne Whitehead

### Absent:

- Kimberly Chowning
- Bob Haines
- Jim Tarpey
- Doug Wilhelm
- Bruce Zgoda

### Staff:

- Judi Nicholas, Program Manager
- Dave Coffman, Program Analyst
- Marla Ofilas, Note Taker

### Welcome/Roll Call

Jerry welcomed the committee members and reviewed the agenda. Marla took roll and a quorum was not met.

### Sub-committee Report

- **Publication Method Guide (PMG)**  
The sub-committee met on June 20 with several key people that are involved with updating the publication method guide (PMG) for the upcoming filing season. Aside from TAP members and staff, the meeting was attended by Tax Resolution Representatives (TRR), Field Assistance Headquarters analysts, and Quality Assurance staff. Ten tax law categories (TLC) were identified for review or change based upon frequency of use and audit results from the Treasury Inspector General for Tax Administration's (TIGTA) office. The list was narrowed down to the following TLCs: Earned Income Tax Credit, Dependents, and Filing Status. The sub-committee will meet on July 18 to review the three categories and offer suggestions for improvement.

Shirley explained that Estelle is interested in the thoughts, ideas, and concerns from the TAC committee. Estelle is hoping that she can forward a TAP recommendation to the PMG team working on the 2007 PMG. Jerry F. asked if there was a due date to provide Estelle with a recommendation. Shirley stated it would be helpful to provide any recommendations by the August 8 teleconference.

- **Customer Experience Sub-committee**

Judi explained that the sub-committee reviewed the survey instruments for both the customer and the employee. The sub-committee members felt that the employee survey should be delivered as a written survey to preserve the anonymity of the employee. The employee survey will also include a comment section for written feedback.

After the sub-committee reviewed the customer survey, members decided to remove two questions. In addition, the sub-committee decided to include demographic questions and a section for customer comments on the survey. Estelle has asked Bernie Coston, TAP Director, to work with the research employees within TAS to ensure that the survey is statistically credible. The sub-committee will await the feedback from the research function.

**Decision:** The sub-committee agreed to change "Reason(s) for visiting the TAC" into a question and provided boxes to check with a space for "Other."

**Action:** Judi and Shirley will check with the TAB team regarding data that was collected during the phase one report. Judi felt that the sub-committee would benefit by reviewing the data collected by the TAB team to ensure efforts are not duplicated.

### **Program Owner Comments**

Shirley explained that Estelle is hoping to have a coordinated effort between the TAB team and TAC committee. Shirley reiterated that she would contact the TAB team to request the data that was collected.

Shirley asked the committee how they felt about the timeframe for completing the survey. Jerry explained that he is hoping to complete a recommendation before TAP finishes its year and be able to provide a report-out to the Joint Committee. Jerry M. commented that the survey should be administered in two phases, during the off-peak season and during the tax season. Jerry M. explained that the committee could get different answers, depending on the season. Shirley noted that this idea should be considered. She will inform Estelle.

**Action:** Shirley will check into having the survey completed in two phases, during tax season and during the "off" season.

### **Member Comments**

No additional member comments

**Decision:** The Customer Experience sub-committee decided to cancel the July 13 teleconference.

**Action:** Dave will inform the additional sub-committee members regarding the cancellation.

### **Closing**

Jerry thanked the members and closed the meeting



## Taxpayer Assistance Center (TAC) Committee Meeting Minutes

June 6, 2006

### Program Owner:

- Tunley, Estelle (Director, Field Assistance)
- Washington, Shirley (Analyst)

### Members:

- Fireman, Jerry (Chair)
- Haines, Robert
- Matheny, Bill
- Whitehead, Wayne

### Absent:

- Chowning, Kimberly
- Melchior, Jerome
- Wilhelm, Doug
- Zgoda, Bruce (Vice-Chair)

### Staff:

- Coffman, Dave (TAP Analyst)
- Nicholas, Judi (TAP Manager)
- Ofilas, Marla (Note Taker)

### Welcome/Announcements/Review Agenda

Jerry welcomed the committee members. Marla took roll and a quorum was not met.

### Publication Method Guide (PMG) Sub-committee Report – Bob Haines

The sub-committee received the 2005 PMG tax law category (TLC) index. Shirley stated that a list of the top-ten TLCs were sent to Dave and Judi and will be shared with the sub-committee. Using the top-ten list, the sub-committee will choose two or three topics as their focus. The sub-committee is also interested in employee feedback on the topics that are included in the sub-committee focus.

**Action:** Judi will provide a copy of the top ten list to the sub-committee.

**Action:** The sub-committee will review and select the top four or five TLCs to review for improvements.

**Action:** Dave will provide hard copies of the selected topics for the June 20th meeting.

**Action:** Shirley will provide the employee-selected topics prior to the June 20th meeting.

Shirley stated that she is working on identifying the Tax Resolution Representatives (TRRs) and analysts that will work with the sub-committee. The goal is to have them available during the June 20th sub-committee meeting.





**Decision:** The sub-committee and the TRRs will review the top ten topics independently. During the teleconference on June 20th the sub-committee members and TRRs will share their thoughts about which topics should be worked.

Estelle stated that she would like everyone to stay on the same page -- understanding what the committee is trying to do and understanding the challenges from the TRR's perspective. She asked the sub-committee to keep in mind that the PMG is not an interactive tool but look for opportunities to make the PMG an interactive tool.

**Final Decision/Action:** Prior to the June 20th sub-committee teleconference, the members will receive a list of 10 PMGs and publications for their review. The sub-committee members will also consider the input from the TRRs to determine their final selection of topics to be worked.

One member asked about the PowerPoint presentations that were provided by the knowledge management vendors from last month's meeting.

**Action:** Dave will contact Kimberly for the PowerPoint presentations.

#### **Customer Experience Sub-committee – Update**

Estelle explained the objectives of the customer experience sub-committee. The sub-committee is developing a survey which will provide input from both the TRRs and the taxpayers who visit the taxpayer assistance centers (TAC). Once the survey is developed, the sub-committee should discuss and decide:

- How the survey will be administered,
- How the data will be used to analyze taxpayer/employee input

In addition, the sub-committee has challenges to overcome:

- Clearance to administer the survey within the IRS,
- Cost, and
- Who will deliver the survey?

Judi stated that she had a discussion with the TAP Director, Bernie Coston. He is exploring the possibility of using TAP members to administer the survey. TAP members would be trained on administering the survey. Bernie felt that if TAP members administered the survey, useful data may be gathered from TAC offices across the country with minimal cost. Bernie will discuss this with the TAP Joint Committee. He is also hoping to utilize TAS research employees to compile and conduct analysis of the data. Estelle asked that the research employees, within her organization, be utilized as well.

**Action:** Judi will ensure that Bernie has a discussion with both TAS and W&I research employees to compile and conduct analysis of the data.

Judi reminded everyone that, as an advisory board, TAP may have more latitude than the IRS in conducting surveys. Bernie has assigned a staff member to research this.

**Decision:** The sub-committee will continue meet on Thursday June 8, 2006 to refine the questions and eliminate any that are repetitive.

**Action:** Shirley will see if Mike Roberts would be available to join the teleconference on Thursday June 8.



**Decision:** Since Jack Morrell resigned from TAP, Bruce Zgoda will take over as lead of the Customer Experience sub-committee.

**Program Owner Comments.**

Estelle stated she would like to ensure that the data collected from the survey is valid and credible. The committee is not trying to get people's opinions but trying to get data that can become actionable and not anecdotal.

Jerry asked if there was any new information regarding the taxpayer assistance blueprint (TAB) report. Estelle did not provide any specifics. However, she noted that some data has been gathered relating to field assistance.

Jerry asked if there were additional member comments. Judi explained that an e-mail survey was sent to the committee members to choose a new meeting date because the next scheduled meeting is on July 4th.

**Decision:** The committee has agreed to reschedule their next teleconference for Tuesday July 11, 2006 at 9:00 am, Pacific Time.

**Action:** Judi will send an e-mail reminder regarding the new meeting date.

**Member Comments**

No member comments.

**Closing**

Jerry thanked the members and closed the meeting.



## Taxpayer Assistance Center (TAC) Committee Meeting Minutes

*Face-to-Face Meeting  
Denver, CO  
May 4, 5 and 6, 2006*

### Program Owner:

- Tunely, Estelle
- Washington, Shirley (Analyst)

### Members

- Chowning, Kimberly
- Fireman, Jerry (Chair)
- Haines, Robert
- Matheny, Bill
- Melchior, Jerry
- Morrell, Jack
- Whitehead, Wayne
- Wilhelm, Doug
- Zgoda, Bruce (Vice-Chair)

### Staff

- Coffman, Dave (Analyst)
- Coston, Bernie (TAP Director)
- Nicholas, Judi (Program Manager)
- Ofilas, Marla (Note taker)

### Guest

- Roberts, Mike (Analyst)

### Opening/Welcome/Review Agenda

Jerry opened the meeting and welcomed the members. The agenda was reviewed. Estelle stated that Mark Pursley, Director of Customer Assistance, Relationships, & Education (CARE) would join the committee via teleconference later in the day.

### Goals and Accomplishments

- **Customer Experience Sub-committee – Jack Morrell**  
The sub-committee will focus on creating a survey that will provide the TAC committee with feedback about the customer experience from both sides of the counter. The target audiences are the Taxpayer Resolution Representatives (TRR) and the taxpayers that visit the TAC offices for assistance. Mike Roberts, Policy Analyst, will help the sub-committee through the process that will end in creating a survey that asks the right questions and collects data that will be useful.

Estelle asked the sub-committee to consider some methods of administering the survey. The purpose and goal of the survey is to determine the quality of service provided in the TAC



offices. Estelle also reported that she is not moving forward on any recommendations until the Taxpayer Assistance Blueprint (TAB) is presented in October.

- **Publication Method Guide (PMG) Sub-committee – Bob Haines**

The sub-committee goal is to recommend an improved tool for the TRRs to provide accurate assistance to taxpayers. The sub-committee has scheduled several guest speakers to discuss industry practices in the area of knowledge management.

Estelle stated that the sub-committee would need to develop a process that will make it easier for experienced TRRs as well as new TRRs to provide accurate assistance. New employees have found the PMG easy to work with because it provides systematic instructions, which aids in providing the correct answer. Although the PMG guides the TRR to the correct answer, some experienced TRRs have found the PMG cumbersome. They feel that they already know the answer to the taxpayer's question(s) but are still required to use the PMG.

Estelle would ultimately like the sub-committee to speak to the TAC employees and analyze their input.

### **TAB Report – Teleconference with Mark Pursley, Director of Customer Assistance, Relationships, & Education (CARE)**

Estelle welcomed Mark to the meeting. Mark asked how the committee would like him to start his presentation. Jerry F. indicated that he would like to start by identifying who the report is aimed at and its purpose.

Mark explained that the genesis of the report is a recommendation made by the Joint Appropriations Committee. The Committee believed that the IRS should consult with stakeholders, the National Taxpayer Advocate (NTA), and the IRS Oversight Board prior to terminating or reducing any taxpayer services. Additionally, Conference Report 109-301 directed the IRS to collaborate in joint authorship with the NTA and the IRS Oversight Board in the development of a five-year plan, or a five-year strategy, to deliver taxpayer services which include long-term goals and reflect a balance between law enforcement and service.

In the first statement of the report, the IRS addressed the issue of service delivery, defining and providing value by way of services to the taxpaying public. Since Commissioner Rossotti initiated the organizational technology modernization plan in the year 2000, specific efforts have been made to address and improve the quality and accessibility of IRS services.

Mark explained that the report is intended for the Joint Conference, both the House and Senate appropriations committees and the finance committee. Other audiences include Congress, Treasury, OMB, NTA and community partners, and practitioners. Also included are individuals that have an interest in overseeing or participating in the broad community that provides services in tax administration. A third broad audience is the IRS itself, the functions that are engaged in the services as well as the employees.

Jerry F. asked if the document was also intended for the general public. The report is not directed to the general public. The general public is the beneficiary of the report and the general public's interests are certainly factored into the report. This is a business strategy and is not directed to, specifically, the general public as the primary audience.

Jerry stated that he understands phase one will lay out the background and identify some of the issues, however the TAC committee would like clarification on how the plan will turn into something concrete and affect the operation of IRS services. Mark added that phase two of the report will lay out a set of business outcomes. Mark felt that the TAC committee would have the opportunity to provide their input during phase two of the report.



### **Closing**

The meeting adjourned for the day.

**May 5, 2006**

### **Program Owner**

- Tunley, Estelle
- Washington, Shirley (Analyst)

### **Members**

- Chowning, Kimberly
- Fireman, Jerry (Chair)
- Haines, Robert
- Matheny, Bill
- Melchior, Jerry
- Morrell, Jack
- Whitehead, Wayne
- Wilhelm, Doug
- Zgoda, Bruce (Vice-Chair)

### **Staff**

- Coffman, Dave (Analyst)
- Coston, Bernie (TAP Director)
- Nicholas, Judi (Program Manager)
- Ofilas, Marla (Note Taker)

### **Guest**

- Roberts, Mike (Analyst)

### **Opening/Welcome/Review Agenda**

Jerry welcomed the members to day two of their face-to-face meeting. Jerry explained that the members would break into their sub-committees to work on their assigned tasks. The committee will reconvene at the end of the day for a brief report out.

### **Sub-committee Breakouts**

The members of the PMG and Customer Experience sub-committees met for the remainder of day.



**May 6, 2006**

**Program Owner**

- Tunley, Estelle
- Washington, Shirley (Analyst)

**Members**

- Chowning, Kimberly
- Fireman, Jerry (Chair)
- Haines, Robert
- Matheny, Bill
- Melchior, Jerry
- Morrell, Jack
- Whitehead, Wayne
- Wilhelm, Doug
- Zgoda, Bruce (Vice-Chair)

**Staff**

- Coffman, Dave (Analyst)
- Coston, Bernie (TAP Director)
- Nicholas, Judi (Program Manager)
- Ofilas, Marla (Note Taker)

**Guest**

- Roberts, Mike (Analyst)

**Opening/Welcome/Review Agenda**

Jerry opened the meeting and welcomed the members.

**Publication Method Guide (PMG) Sub-committee Report – Bob Haines**

The sub-committee met with two TRRs who used two scenarios to demonstrate how the PMG is used to answer taxpayer questions. The sub-committee found that the PMG, in Adobe PDF format, is not interactive. In addition, the committee observed that some questions asked were out of order. For example, on the topic of Medical and Dental Expenses, the sub-committee felt that question #8 – “Were the expenses paid for you, your spouse, your dependent or other qualifying individual” – should be asked earlier in the interview. At the beginning of the scenarios, the taxpayer indicated that, while she paid her mother’s medical expenses, her mother was not a qualifying dependent. She would like to know if she could deduct the medical expense. The sub-committee felt that if the question were asked at the beginning of the interview, it would have resulted in terminating the interview because the medical expenses could not have been claimed.

**Decision:** After the demonstration, the sub-committee decided that they would like to review the topic in the PMG and make suggestions to reorder the questions asked.

**Action:** The sub-committee has requested a list of 83 topics used in the PMG.



The committee would like to see a much more interactive PMG. The sub-committee listened to speakers from two software companies who provided comments on how the PMG could be interactive. It was agreed that the PMG could be more like TurboTax, for example, where the questions asked are easily understood in a system that is easy to navigate.

**Action:** The sub-committee would like to know which topics are used most often.

#### **Customer Experience Report – Jack Morrell**

The sub-committee developed 15 customer questions and 13 IRS employee questions. Bernie Coston will research questions raised from the sub-committee on administering the survey to TAC employees and TAC customers. The IRS has strict restrictions on administering surveys. A series of steps must be followed in order for the process to be approved.

**Action:** Bernie and Estelle will meet to talk about administering surveys to employees and to TAC customers.

Estelle stated that the purpose of the survey is to ensure that TAC customers receive the best experience possible when visiting a TAC. Estelle will stay involved with the sub-committee to ensure that the survey asks the right questions.

#### **End of meeting Assessment**

The members had a chance to provide input on the meeting. Most members felt that it was a productive meeting and much was accomplished.

#### **Closing**

Jerry closed the meeting and thanked everyone that attended. The next meeting will be a teleconference on Tuesday, June 6, 2006.



## **Taxpayer Assistance Center (TAC) Committee Meeting Minutes**

*April 4, 2006*

### **Designated Federal Official:**

- Judi Nicholas, TAP Manager

### **Program Owner:**

- Estelle Tunely, Director, Field Assistance
- Shirley Washington, Analyst

### **Attendance:**

- Jerry Fireman (Chair)
- Bill Matheny
- Jerry Melchior
- Jack Morrell
- Wayne Whitehead
- Doug Wilhelm
- Bruce Zgoda (Vice-Chair)

### **Absent:**

- Kimberly Chowling
- Bob Haines
- Jim Tarpey

### **Staff:**

- Dave Coffman, Analyst
- Marla Ofilas, Note Taker

### **Opening/Welcome, Roll Call:**

Judi opened the meeting and Jerry welcomed the members. Jerry reminded everyone that the Joint Committee meets the 1st Wednesday of the month at 1:00 p.m. eastern time. He encouraged anyone who's interested in tracking what's going with other committees, both issue committees and area committees, to attend a meeting.

Dave took roll, a quorum was met.

### **Customer Experience Sub-Committee Report:**

Jack reported there have been quite a few studies done on the TACs in the past. He wonders if there's a different approach the sub-committee could take.

Jack suggests a starting point of looking at what the TACs can do and do well, instead of asking them to do everything that they're allowed to do.





Judi explained that the documents Jack referred to were forwarded to the sub-committee to sort through and decide which direction the sub-committee may want to take. Once they have that direction they could report out to the full committee.

Judi explained that in the sub-committee's first meeting there was a lot of discussion about developing a data collection instrument (DCI) that could be used as a survey. This survey could be used for both the taxpayers and the TAC staff. One of the next steps is to talk about the type of data that is needed. The committee will not have a DCI developed before the end of the filing season.

**Publication Method Guide (PMG) Sub-Committee Report:**

Estelle, the program owner, requested that the sub-committee look at industry best practices regarding knowledge management. What does the private industry use and how does it work? Kimberly has prior experience in this area and will be providing information to the sub-committee members in the form of a white paper. The sub-committee will decide which organizations to approach to get a better understanding of how they manage knowledge. The sub-committee also planned to see if someone from Kaiser Permanente (headquartered in Denver) might be able to come to the meeting and talk about the kinds of survey tools their employees use.

**Taxpayer Assistance Blueprint (TAB) Report:**

The TAB report should be out within two weeks. Estelle will ensure that the TAC committee members receive a copy of the report.

**Face-to-Face Meeting**

Judi gave an overview of the Face-to-Face meeting.

- Agenda and Pre-read materials will be distributed a week before the meeting.
- Meeting will start on the afternoon of Thursday May 4th
- Meeting will continue all day Friday, May 5th
- Meeting will conclude in late morning on Saturday, May 6th.

Judi requested the sub-committees to hold their regular monthly meetings and use that time to determine where they want to go in the face-to-face meeting. Sub-committees also must decide on the materials they'll need for the face-to-face meeting.

Customer Experience sub-committee conference call is at 10:00 a.m. Pacific time, Thursday the 13th.

The PMG sub-committee conference call is at 10:00 a.m. Pacific time on Tuesday the 18th.

Agenda, pre-read material and call in information will be sent out a week in advance of the conference call.

The next TAC conference call is scheduled for June 6th.

**Comments:**

The meeting was very informative and went well. It was one of the most productive meetings the members have attended.

**Meeting closed.**



## Taxpayer Assistance Center (TAC) Committee Meeting Minutes

March 7, 2006

### Program Owner

- Estelle Tunley

### Attendance

- Kimberly Chowning
- Jerry Fireman, Chair
- Bill Matheny
- Jerry Melchior
- Wayne Whitehead
- Doug Wilhelm
- Bruce Zgoda, Vice-Chair

### Absent

- Robert Haines
- Matthew Henry
- Jack Morrell
- Jim Tarpey

### Staff

- Judi Nicholas, Designated Federal Official
- Dave Coffman, Analyst
- Marla Ofilas, Note Taker

### Guest

- Shirley Washington
- Lauren Foard, Local Taxpayer Advocate

### Opening/Welcome

Jerry Fireman opened the meeting and welcomed all the participants. Jerry reviewed the agenda and roll call was performed. A quorum was met.

### Update on the Taxpayer Assistance Blueprint Team (TAB) Feedback on the Draft Report

Estelle explained that the TAB report is undergoing a draft review. The first phase of the report which is due out April 14, will contain data rather than operational recommendations. The data was gathered through town hall meetings, focus groups, and interviews. Estelle envisioned that the TAC committee would provide operational recommendations as part of the second phase of the report. Estelle proposed that the face-to-face meeting in May would be an intense working meeting to produce recommendations for that report. Mark Pursley, Director, Customer Assistance, Relationships and Education (CARE) is scheduled to participate in the face-to-face meeting.

**Decision:** The committee agreed with Estelle's proposal and also agreed to work on the recommendations during the first and second day of the meeting.



**Action:** Members agreed to notify Dave if they are interested in receiving a hard copy of the TAB report.

### **Subcommittee Organization**

- **Subcommittee Purpose / Task**  
Each subcommittee will work on an issue brought forth by Estelle. These issues are the Publication Method Guide and the Customer Experience. The subcommittees will meet monthly to discuss the issue and provide a recommendation for improvement. Judi and Dave will facilitate the initial meeting where a lead will be identified to facilitate future meetings and provide reports to the entire committee during each TAC teleconference. During the reports, it is vital that the lead provide a detailed report and obtain feedback and comments. Notes will also be taken during each subcommittee meeting by the analyst. The notes will only include action items and decisions made. Each subcommittee will review specific questions, provided by Estelle. Dave will provide those questions and include them as part of the subcommittee agenda. Meetings will also be scheduled for one hour.
- **Meeting Times**  
The committee discussed and decided on dates and times for standing subcommittee meetings.
- **Lead Selections**  
**Decisions:** Members decided to make their selections during their first subcommittee meeting.

**Action:** Dave will send out a reminder of times and dates for each subcommittee meeting.

### **Member Comments**

Jerry asked if there were any comments for the members of the committees. Members felt that it was a productive meeting. No additional comments were made.

Judi closed the meeting.