



2007 Meeting Minutes Taxpayer Assistance Centers (TAC) Issue Committee

- November 20, 2007
- November 1-3, 2007
- October 2, 2007
- September 4, 2007
- August 8, 2007
- July 19, 2007
- June 5, 2007
- May 1, 2007
- April 3, 2007
- March 9, 2007
- February 6, 2007
- January 12, 2007

Taxpayer Assistance Center (TAC) Issue Committee Meeting Teleconference Minutes November 20, 2007

Program Owner

Beth Tucker
Michelle Jones, Field Assistance Analyst

Attendance

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

Guest

Jeff Wilson, TAS Research Analyst

Staff

Judi Nicholas, Designated Federal Official
Dave Coffman, TAP Program Analyst

Welcome/Announcements

Jerry Fireman opened the meeting and welcomed the participants. Dave took roll call and a quorum was met.

Committee Report Review

The committee determined that it would be best to review the draft which was originally edited by Patrick Jackson and subsequently edited by Wayne.



Necessary Edits

The committee reviewed the draft, page-by-page, checking grammar, style and statistics.

DECISION: The committee decided not to include a glossary in the report. Instead, jargon and acronyms would be explained by using footnotes in the report.

Michelle mentioned that, at the time the employee survey was taken, the technical employees within the TACs were operating as Tax Resolution Representatives (TRR). Recently, the positions were re-named to Individual Tax Advisory Specialists (ITAS).

ACTION: Dave will include the change in position title as a footnote in the report.

Wayne noted that Jeff will provide more information about the survey orientation. The newly added information will supplement the methodology section of the report.

ACTION: Jeff will e-mail the supplemental information to Dave.

The committee discussed the word order of the dedication. They agreed to re-word the dedication and remove the box which surrounds the dedication statement.

ACTION: Dave will make the requested change and remove the box around the dedication statement.

The committee discussed the font sizes in the introduction as well as some of the quotes in the introduction.

ACTION: Dave will ensure the fonts are consistent in the introduction and the rest of the report. Dave will also make the requested changes to the quotes in the introduction.

Bob mentioned that some of the statistical statements in the executive summary appear to have glaring "unknowns" which may lead the reader to an incorrect conclusion. Jeff also pointed out some errors with the statistics.

ACTION: Dave will re-word the statistical statements which appear to draw incorrect conclusions. Dave will also update the erroneous statistics.

Bob noted that a definition is needed for the transcript delivery system.

ACTION: Michelle will provide Dave with an explanation of the transcript delivery system. Dave will then include the explanation as a footnote in the document.

The committee continued reviewing the rest of the document, pointing out changes which Dave will incorporate in the final draft.

Report Distribution

Judi said the report will be distributed to all TAP members at the annual meeting. The committee asked that a copy of the final report be shared with the Acting Commissioner and the National Taxpayer Advocate, after it's shared with Beth.

ACTION: Dave and Judi will determine the quantity for the print order and communicate the final number to Michelle.

Next Actions

Jerry Fireman informed the committee that they will have the opportunity to make two short presentations on their findings at the upcoming annual meeting. Jerry is working on an outline for the presentation.

ACTION: Judi will e-mail each committee member to inform them which presentation they are scheduled to attend.

Jerry also mentioned that he will distribute the self-assessment questionnaire to all committee members. Members were asked to complete and return the assessment to Jerry.



Program Owner Comments

No comments were made.

Member Comments

Judi reminded everyone that this is Doug's last meeting with the TAC Committee. He will retire from TAP at the end of this year. The committee thanked Doug for his dedication and hard work as a member of the TAC Committee.

Closing

Jerry closed the meeting.



**Taxpayer Assistance Center (TAC) Issue Committee
Face-to-Face Meeting
Chicago, Illinois
November 1-3, 2007**

Thursday - November 1, 2007

Program Owner

Beth Tucker
Michelle Jones, Field Assistance Analyst

Attendance

Jerry Fireman, Chair
Bob Haines
Jerry Melchior
Wayne Whitehead
Doug Wilhelm

Guests

Jeff Wilson, TAS Research Analyst
Patrick Jackson, TAS Communication Analyst

Staff

Bernie Coston, TAP Director
Judi Nicholas, Designated Federal Official
Dave Coffman, TAP Program Analyst
Marla Ofilas, TAP Secretary

Opening/Welcome/Introductions/Review

Jerry opened the meeting. Each attendee introduced themselves. A quorum was met. The committee reviewed the agenda and the meeting materials.

Meeting Purpose and Goals

Jerry informed the committee that the goal of this meeting is to prepare the recommendations and fill in the body of the report. Jerry asked the group to refrain from wordsmithing the document at this stage.

Dave stated that this meeting is also a great opportunity to get input from both Beth and Michelle on how the document will benefit Field Assistance.

Beth noted that she already agrees with some of the recommendations outlined in the report.

Conclusions and Recommendations

Customer Survey Review:

The committee reviewed the conclusions and recommendations from the customer survey and provided their input. Dave made changes to the document as they were discussed by the committee.

DECISION/ACTION: The committee will incorporate the comments Jeff made on the conclusions and recommendations.

DECISION: The committee determined that each set of percentages listed in the report will not necessarily total 100%. Only percentages which support a particular conclusion or



recommendation will be listed. Anyone interested in a complete list of the percentages may review the raw data.

DECISION: The committee decided to use whole number percentages to ensure consistency throughout the document

DECISION: The list of TAC users by age will be listed in chronological order.

Summary of Customer Survey Observations/Concerns:

The committee reviewed the summary of observations and concerns for the customer survey. It was suggested that the words used in the observations describe "feelings", not "comfort levels".

DECISION: The committee decided to remove the reference to Highway Use Tax.

ACTION: Jeff will prepare a cross-tabulation on the Highway Use Tax to determine if the reference should remain in the document.

The committee discussed the need to compare the survey results on Internet usage with overall internet usage in the U.S.

ACTION: Dave will research a recent PEW Internet study. Jeff will send Dave a link to the study.

Employee Survey Review:

Bob summarized the main points of the review.

Bob asked if there are any statistical problems with comparing the results from the 27 sites selected for the customer survey and the 400 sites for employee survey. Jeff said that he doesn't think there would be a problem with comparing information between the two surveys.

Beth asked if it was possible to check the sites that took the customer survey with the employees (from those same sites) that took the employee survey. Wayne explained that Estelle didn't want to drill down to that level. She was looking more for an overall comparison without any reference to a particular office.

Patrick informed the committee that the customer survey summary is written as a statistical analysis while the employee survey summary is in a narrative format. Both summaries should be consistent.

Summary of Employee Survey Observation/Concerns:

The committee reviewed the observations and concerns and provided their input. Dave made the changes directly to the report.

End of Day Announcements

The full committee will continue to review the survey data during the evening and be prepared to discuss the changes during tomorrow's session.

Friday - November 2, 2007

Program Owner

Beth Tucker

Michelle Jones, Field Assistance Analyst



Attendance

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

Guests

Jeff Wilson, TAS Research Analyst
Patrick Jackson, TAS Communication Analyst

Staff

Bernie Coston, TAP Director
Judi Nicholas, Designated Federal Official
Dave Coffman, TAP Program Analyst
Marla Ofilas, TAP Secretary

Welcome/Announcements

Jerry opened the meeting.

Beth provided some input on each recommendation that the committee was considering.

ACTION: Based on Beth’s input, the committee will consider including a better means of cash conversion on their recommendation to improve procedures to accept cash.

Michelle explained that what the committee has completed is good work and Field Assistance management (Beth) can implement most of the suggestions.

Jerry asked if there was a method by which TAC employees can submit suggestions for improvement. Michelle replied that there are several ways that employees can submit suggestions. Submitting suggestions via the web site is the preferred method. The suggestion is reviewed by top management. If the suggestion is implemented, the employee is asked to submit the suggestion on a form so that management can provide an award to that employee.

Judi commented on the recommendation for Field Assistance management to hold focus groups with TAC employees. She asked the committee to consider revising their recommendation to include a facilitator for each focus group session. This would eliminate the need to have management involved with facilitating the sessions.

The committee continued with editing the recommendations and rationales for each recommendation. Dave assisted by incorporating the edits into the report as each item was discussed.

Bernie explained that he will release the raw data to TIGTA on Monday. Members were not pleased with TIGTA’s early involvement in the survey.

Beth complimented the members on their progress. She felt the report will be an excellent tool for Field Assistance. She was impressed with how the members captured the dedication of the TAC employees.

The committee discussed placing a dedication within the document.

DECISION: The report will be dedicated to TAC employees and managers. A dedication will be made in the report.



End of Day Announcements

Jerry reviewed agenda for tomorrow. Topics to be covered include the report cover, appendix, and all other parts of the report that were not covered.

Saturday - November 3, 2007

Program Owner

Michelle Jones, Field Assistance Analyst

Attendance

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

Guests

Jeff Wilson, TAS Research Analyst
Patrick Jackson, TAS Communication Analyst

Staff

Bernie Coston, TAP Director
Judi Nicholas, Designated Federal Official
Dave Coffman, TAP Program Analyst
Marla Ofilas, TAP Secretary

Welcome/Announcements

Jerry opened the meeting.

Cover Page

The committee reviewed the cover page of the report that Patrick drafted. The committee determined that a different color scheme is needed for the letters which make up the "Taxpayer Advocacy Panel" box at the top of the page. They agree that the box's blue background is a good choice for the cover page. The committee also would like to see "Taxpayer Assistance Center" more prominent in the cover page.

ACTION: Patrick will make the necessary changes to the cover page and e-mail it to Judi.

Transmittal Letter

The committee discussed and proposed some changes to the report's transmittal letter. They also agreed that the letter will be included as part of the report. The dedication will be separate from the letter.

Introduction and Executive Summary

The committee discussed changes to the report's introduction and executive summary. Information about TACs and the TAP program will need to be inserted into the introduction. Also, some of the statistics in the executive summary will need to be updated. Michelle noted that the position title of TRRs has recently changed. The committee agreed that the report should continue to refer to the employees as TRRs but include the new title as a footnote in the executive summary.

ACTION: Michelle will provide information on TAC for the introduction.

ACTION: Dave will insert information about the TAP program into the introduction.



ACTION: Jeff will provide some updated statistics for the executive summary.

ACTION: Michelle will provide Dave with the new title for TRRs.

Appendices

Dave provided examples of each document that will be used in the appendix.

After reviewing the orientation handouts, Jeff noted that the orientation, provided to TAC managers and survey administrators, should be included in the methodology section.

ACTION: Dave will send Jeff an electronic version of the survey administrator orientation talking points.

ACTION: Michelle will send Jeff an electronic version of the TAC manager orientation talking points.

Roles

Patrick wanted to clarify his role in the process. Judi stated that Patrick will format the document so it looks like it was written by one author. She also said that Patrick will provide grammatical and structural edits.

Michelle said that she will work with the printers to get the report printed. The report will be spiral bound with a glossy cover using card stock paper. Michelle also confirmed that copies of the reports will be available for the annual TAP meeting in December.

Judi noted that Beth will get the first copy of the report.

Jerry informed the committee that he will give a presentation on the document at the annual meeting.

Next Steps

The following action items were confirmed:

ACTION:

- **Patrick will complete his initial edits and e-mail the draft to the committee, Beth, Judi, Carol and Jeff by November 16, 2007.**
- **There will be a conference call on November 20, 2007 to discuss/approve Patrick's edits.**
- **Michelle will continue to work with publishing on the report.**

Program Owner Comments

On behalf of Estelle and Beth, Michelle thanked the members for their dedication and enthusiasm for this project. Jerry added that the task of administering a survey and coming to an agreement can be difficult. The committee's attention to detail and their ability to work well together made the job of TAC committee chair an easy one. Jerry thanked the staff and panel members for their time and effort.

Closing

Jerry closed the meeting and wished everyone a safe trip home.



**Taxpayer Assistance Center (TAC)
Issue Committee Meeting
Teleconference Minutes
October 2, 2007**

Program Owner

Estelle Tunley
Beth Tucker

Attendance

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

Guest

Linda Baker
Carol Hatch
Patrick Jackson
Michelle Jones, Field Assistance Analyst

Staff

Judi Nicholas, TAP Program Manager
Dave Coffman, TAP Program Analyst

Welcome/Announcements

Jerry welcomed the members and guests. Roll call was completed and a quorum was met.

Estelle introduced the new Director of Field Assistance, Beth Tucker. Beth will be attending the November meeting in Chicago and the December meeting in Washington, DC. Estelle informed the committee that this will be her last teleconference with this committee.

Judi introduced Patrick Jackson, analyst with the Taxpayer Advocate Service. Patrick will assist the committee with the edits to their final document.

Customer Survey Subcommittee Report

Bruce reported that the subcommittee has completed their report. The subcommittee is now waiting for input from the full committee and assistance from Patrick.

Employee Survey Subcommittee Report

Bob reported that the subcommittee is working on writing their report. The report will be completed and available for review prior to the face-to-face meeting in Chicago.

Report Odds & Ends

Members and guests discussed the necessary actions to drafting the document. The full committee agreed that the final product should be completed by November 30. The members will use their time in Chicago to prepare the draft report. Patrick has agreed to edit the draft report and provide it to the members by Friday November 16. This will give the members time to review the report prior to their Chicago meeting.



Distribution of the final report was discussed. All agreed that the program owner of the TAC issue committee will be the formal recipient of the report. A courtesy copy will be sent to the National Taxpayer Advocate and Acting Commissioner. In addition, the members would like to share the report with the members of TAP. Copies of the report will be produced and distributed at the annual meeting. An electronic version of the report will also be available.

ACTION: Michelle will produce 120 copies of the report.

Conference Call for November

The full committee agreed to meet on November 20th via teleconference to finalize the report.

Agenda for Face-to-Face Meeting

Dave reviewed the draft agenda. During the first day of the meeting, the members will come to an agreement on the conclusion of their findings. Day two and three will be used to combine both reports and draft the overall report.

Wayne asked if raw data should be included in the report. Carol replied that the raw data could be included, but should appear as an appendix.

ACTION: Dave will send draft agenda to Jerry for approval.

Program Owner Comments

Estelle expressed her appreciation by thanking the members for their hard work. Beth mentioned that she looks forward to working with the group and asked to include her in all e-mails.

Action: The members and staff will include Beth Tucker on all appropriate e-mails.

Closing

Jerry closed the meeting.

Next meeting is scheduled for November 1-3, 2007 in Chicago.



**Taxpayer Assistance Center (TAC)
Issue Committee Meeting
Teleconference Minutes
September 4, 2007**

Program Owner

Estelle Tunley
Michelle Jones, Field Assistance Analyst

Attendance

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

Guest

Hillary Goehausen

Staff

Judi Nicholas, Designated Federal Official
Dave Coffman, TAP Program Analyst

Welcome/Announcements

Jerry welcomed the members and guests. Each attendee introduced themselves which substituted as roll call. A quorum was met.

Customer Survey Subcommittee Report

The subcommittee has been working on the customer survey referral, which includes 13 recommendations. The subcommittee has completed its report and is waiting for further action from the employee survey subcommittee so that both referrals can be combined into one report.

ACTION: Wayne will email a draft of the recommendations to the committee members.

Employee Survey Subcommittee Report

Each subcommittee member is working independently to come up with their own findings and conclusions. Bob noted that the next step will be to meet and produce a list of recommendations with rationales for those recommendations. In addition, the subcommittee is waiting for additional cross-tabulations from Carol, which they feel may add to the recommendations.

Judi reminded the members that in addition to the two surveys, Estelle requested a study be conducted to determine if a correlation exists between the results of the customer survey and the employee survey. Judi felt that more time would be needed to work on the report and suggested that the committee hold a face-to-face meeting. All agreed that a face-to-face meeting would be beneficial.

Judi and the members discussed possible dates and locations for the face-to-face meeting.

DECISION: The full committee will meet on November 1, 2, and 3, 2007.

Report "To Do" List

The committee discussed and reviewed the "to do" list created by Dave. Judi explained that the list was created to keep track of member responsibilities.



The committee reviewed member responsibilities.

DECISION: Wayne has agreed to update and monitor the list. Wayne will fill in the names of the responsible parties and include due dates. Wayne will email the list to all members and they will respond, to Wayne, with any comments they may have.

The committee also discussed printing options. Estelle suggested that advance notice should be given to publications of the amount of copies that may be needed.

Program Owner Comments

Estelle informed the members that there is great interest in the survey data. Estelle wanted the members to be prepared that there could be pressure from other IRS divisions and/or other agencies for the data.

Closing

Jerry closed the meeting.

Next meeting is scheduled for Tuesday October 2, 2007.



**Taxpayer Assistance Center (TAC) Issue Committee
Meeting Minutes
August 7, 2007**

Program Owner

Michelle Jones, Field Assistance Analyst

Attendance

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

Staff

Judi Nicholas, Designated Federal Official
Dave Coffman, Program Analyst
Meredith Odom, Note Taker

Opening

Judi opened the meeting and informed the committee that Marla is on vacation and Meredith will take the notes.

Welcome/Announcements/Review Agenda

Jerry welcomed the members and staff. Dave took roll call and quorum was met.

Customer Survey Subcommittee Report

Bruce reported that the subcommittee is currently adding to the document that Wayne put together. The subcommittee is also reviewing the notes from Jeff and Carol. At this point the results are purely results, with no observations or commentary. Doug suggests having a findings/conclusions/recommendations section that will list the ten results outlined in Wayne's summary. Judi reported that Bernie sent a request, via e-mail, to the director of the TAS Publications group. Bernie is requesting some editing assistance from TAS Publications.

ACTION: Judi will follow-up with Bernie on his request for assistance from TAS Publications.

At the next subcommittee call, the subcommittee will establish report timelines and writing assignments.

Employee Survey Subcommittee Report

Bob suggests getting all of the comments in the same format so they read consistently. He also stated that he would like to have the employee comments summarized before a decision is made on who will write the larger portions of the survey. The committee should begin identifying their findings in the near future. Bob reiterated that November 30, 2007 is the goal for completion of the final report.

The committee stated that they would like to look at some sample reports before writing the actual report.

ACTION: Dave will research the Internet, including the TIGTA and GAO web sites for some survey-based reports.



Research Updates

Judi informed the committee that Carol was hoping to analyze the cross tabulations that Jeff ran for the Employee Survey Subcommittee members.

Carol has been away for training and will provide the members with some information soon. Dave will follow up with her to check the status of the information.

ACTION: Dave will contact Carol for a status update on the cross tabulation analysis.

Subcommittee Meeting Dates/Times

Both subcommittees agreed to meet on Thursday August 9, 2007.

ACTION: Dave will send out agendas for the August 9, 2007 subcommittee meetings later today.

Program Owner Comments

Michelle stated that there's a lot of work to do and she's ready to get started.

Member Comments

Judi informed the committee that a subcommittee of TAP is preparing to meet with the IRS Commissioner. Judi will ask Bernie to pass along any information on the survey that's addressed at the meeting.

ACTION: Judi will ask Bernie to inform the committee if the surveys are addressed at the upcoming Commissioner's meeting.

Closing

Judi closed the meeting and reminded members of the upcoming subcommittee meetings.

Next Scheduled Meeting: September 4, 2007



**Taxpayer Assistance Center (TAC) Issue Committee
Face-to-Face Meeting Minutes
Denver, CO
July 19 - 21, 2007**

Thursday, July 19, 2007

Program Owner

Estelle Tunley
Michelle Jones, Field Assistance Analyst

Attendance

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

Guests

Carol Hatch, Research Analyst
Jeff Wilson, Research Analyst

Staff

Bernie Coston, TAP Director
Judi Nicholas, TAP Program Manger
Dave Coffman, TAP Analyst
Marla Ofilas, TAP Secretary

Opening/Welcome/Introductions/Review Agenda

Jerry opened the meeting and welcomed the attendees. Introductions were made and it was determined that a quorum was met. Dave reviewed the agenda topics.

History of the Committee

This issue committee is close to two years old. When the committee began, members were a little unclear on the direction the committee would take. Since then, members have worked together to successfully elevate valuable recommendations to the program owner. Last year, the committee successfully elevated a series of simplifications to the Publication Method Guide (PMG).

The committee is now working on two Taxpayer Assistance Center (TAC) surveys, one for TAC customers and one for TAC employees. The objective of the surveys is to receive feedback from the TAC customer as well as the TAC employee on their overall experience with the service provided within the centers. The customer survey was conducted in two phases – during the filing season and after the filing season. TAP members administered surveys to over 500 TAC customers for each phase of the survey process. An online survey was created for Taxpayer Resolution Representatives (TRR's) that work in Taxpayer Assistance Centers. Over 500 survey replies were received. Tomorrow, the members will spend time working in their subcommittees reviewing the data that was collected.

Jerry thanked all the members for volunteering their time in administering the customer surveys. Jerry also thanked Estelle for being very attentive to the committee.

Estelle provided an update on one of the committee's prior projects, the Publication Method Guide (PMG). Both the PMG and Probe and Response guide are being reviewed to see if call site employees



and field office employees are able to use the same guide to assist customers. A team is in the process of reviewing a new guide which should be available for the 2008 filing season. A draft of the new guide was recently field tested by TRRs. Even though the TRRs received little in the way of instructions, the result of the test was determined to be successful. Training on the new guide will be provided during Field Assistance's Continuing Professional Education (CPE). Bob asked if the new guide will be more interactive. Estelle confirmed that it would be more interactive and will also assist the visually impaired.

Taxpayer Assistance Blueprint (TAB 2)

Jerry Fireman facilitated a discussion on Phase 2 of the Taxpayer Assistance Blueprint (TAB 2). Some members felt that the report does not reflect a blueprint for improvements nor does it define goals. The impression from some members is that the report is a taxpayer compliance blueprint instead of a taxpayer assistance blueprint. In addition, the report does not discuss improving the field offices for taxpayers that have a hard time using the internet or that need to meet IRS employees in person.

Survey Results Orientation

All participants briefly reviewed the data from both surveys. Dave provided an agenda for tomorrow's subcommittee break out groups and Jeff and Carol gave a high level explanation of the survey data that was compiled.

Instructions for Tomorrow's Subcommittee Meetings

Dave explained that the committee members are charged with analyzing the survey data, summarizing their findings, identifying major themes, and formulating potential recommendations. The committee will also need to decide if they will write one report with combined data or two separate reports with explanations of their findings.

Friday, July 20, 2007

Program Owner

Estelle Tunley
Michelle Jones, Field Assistance Analyst

Attendance

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

Guest

Carol Hatch, Research Analyst
Jeff Wilson, Research Analyst

Staff

Bernie Coston, TAP Director
Judi Nicholas, TAP Program Manger
Dave Coffman, TAP Analyst
Marla Ofilas, TAP Secretary

Subcommittee Break Out

The committee members spent the day in their respective subcommittees. The members were



charged with analyzing survey data, summarizing their findings, identifying major themes, and formulating potential recommendations.

To ensure that each subcommittee is balanced with the same number of members, Jerry Melchior agreed to transfer from the Customer Survey Subcommittee to the Employee Survey Subcommittee.

The members will reconvene on Saturday July 21 to inform the committee of their findings.

Saturday, July 21, 2007

Program Owner

Estelle Tunley
Michelle Jones, Field Assistance Analyst

Attendance

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

Guest

Carol Hatch, Research Analyst
Jeff Wilson, Research Analyst

Staff

Judi Nicholas, TAP Program Manger
Dave Coffman, TAP Analyst
Marla Ofilas, TAP Secretary

Welcome/Announcements

Jerry opened the meeting and welcomed the members and guests.

Employee Survey Subcommittee Report

Bob reported on the subcommittee's next steps:

- Carol will work with Jeff to re-tabulate some of the survey data
- Each subcommittee member will summarize the employee comments they were assigned to study, and
- The employee comments will be added as an appendix to the final recommendation report

The subcommittee recognized and identified major themes, which were:

- Employee satisfaction
- Employee training
- Scope of TAC employee services
- The methods managers use to operate TACs
- The order with which taxpayers receive service: Q-matic system
- Location of employee computers
- Office equipment needs



- Staffing needs
- Late tax forms and publications (not getting the proper forms and publications in time for the filing season)

In addition, 11% of business taxpayers visit TAC offices. The survey results show that TRRs would like to have more training on business taxes.

Customer Survey Subcommittee Report

Bruce provided a report outlining three themes that the subcommittee found:

- Taxpayer service delivery
- Access to services
- Measures of qualities of service

The members felt it was important for employees to educate the taxpayers when alternative services are available. In addition, they found that taxpayers who visit the taxpayer assistance centers do so for the comfort and assurance they get by believing their tax situation has been resolved. .

The subcommittee members felt that taxpayer education is vital. The suggestion was made that taxpayers could watch a television monitor with tax topics while waiting for assistance.

Commonalities of Each Study

Jerry explained that there are two committees and two separate reports. The full committee will need to decide if there are commonalities and if there should be one report or two.

Doug suggested that there should be a summary of both reports. Judi asked if there should be an executive summary with overall comments of each survey. Wayne suggested that the executive summary be written separately, and not simply a "cut and paste" from the body of the report.

Judi informed the members that Bernie is soliciting assistance from the TAS Communication and Liaison office, the same office that assists with the National Taxpayer Advocate's annual report to Congress. Estelle wanted to ensure that the report comes from TAP. Judi confirmed that the Communication and Liaison office will not write the report or change the content.

Next Steps as a Full Committee:

Action: Jeff will complete cross tabulation for the Customer Service subcommittee.

Decision: The full committee agreed that the final report will be completed by November 30. Judi suggested that the full committee add additional meetings to complete their report. She stressed the importance of not losing momentum.

Decision: The full committee decided to hold their next meeting on August 7.

Program Owner Comments

Estelle thanked the members for their hard work. Estelle also took time to present awards to those who volunteered to administer the surveys.

End of Meeting Assessment

All members felt that the meeting was a success and thanked Jeff and Carol for their assistance with the tabulation of the survey data.

Jerry closed the meeting.



Next Meeting Scheduled for August 7, 2007.



**Taxpayer Assistance Center (TAC) Issue Committee
Teleconference Minutes
June 5, 2007**

Program Owner

Estelle Tunley

Attendance

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

Guest

Michelle Jones

Staff

Nancy Ferree, Designated Federal Official
Dave Coffman, Analyst
Marla Ofilas, Secretary

Welcome/Announcements

Nancy opened the meeting. Roll call was completed and a quorum was met.

Customer Survey Subcommittee Report

Bruce reported that over 500 surveys were received during phase two. 450 of those received were in English and the balance was in Spanish. Bruce felt confident that the subcommittee will meet their quota. Dave stated that the staff has started coding the surveys will have the results entered on a spreadsheet by June 22. Dave also noted that Carol will tabulate the data and provide the results at the face-to-face meeting in July. Members will then have an opportunity to review and discuss the results and begin formulating conclusions and recommendations.

Doug asked if it was possible to review some examples of recommendation reports. Dave will check with Carol.

ACTION: Dave will contact Carol for some sample recommendation reports or outlines that the members can review for ideas.

Jerry Melchior asked if the committee will review the employee survey during the Denver face-to-face meeting. Dave responded that the members will meet in subcommittees during day two of the meeting. Each subcommittee will have an opportunity to review the results of their respective surveys.

Jerry asked if Carol will identify the findings. Dave explained that Carol will analyze the data and create some bullet points based on the findings.

Doug asked to receive the analysis prior to the face-to-face meeting. He felt that members should be given some time to study the analysis before meeting as a group. Dave said that Carol will be gathering and analyzing the data for both surveys. Based on workload and time constraints the information may not be available for distribution prior to the face-to-face meeting.

ACTION: Dave will contact Carol to find out if the results will be available prior to the face-to-face meeting.



Employee Survey Subcommittee

Michelle explained that the employee’s union was provided a copy of the survey with an explanation of the survey method and dates that the survey will be administered. The union has 30 days to respond. As of this date, no response has been received.

Estelle and committee members discussed possible dates for administering the survey. Estelle felt that employees were inundated with e-mails requesting to take the IRS employee satisfaction survey, which became an irritant for the employees. Estelle proposed that the survey be conducted over three weeks, beginning on June 26. Jerry Fireman agreed that four weeks is too long for conducting a survey. However, Jerry was also concerned that one of the weeks has the July 4th holiday. Employees that are on vacation during the holiday week would have less than three weeks to take the survey.

Doug asked if the survey will be sent to all employees. Estelle replied that she does not have the resources to create an e-mail group code to send the survey link to selected employees. Estelle’s intent is to ensure that the e-mail accompanying the survey link will focus only on technical employees.

ACTION: Dave will contact Carol to find out how much time is needed to analyze and study the employee survey results. This information will be helpful in determining the length of time the survey should be administered.

Doug commented that not all field employees need to take the survey. Doug felt there was a large amount of field employees, and completed scientifically, sixty surveys is about all that is needed. Estelle thought that the employee survey would be administered only to the centers where the customer survey was administered. Dave clarified that the decision was made to open the employee survey to all TAC offices. Also, with the software program that’s being used, it would take the same amount of time to tabulate 60 surveys or 600 surveys. Jerry Fireman agreed that the employee survey should be administered to all TAC offices.

ACTION: Estelle will meet with Area Directors on June 7 for a decision on the employee survey dates.

Program Owner Comments

Estelle was excited that the committee has progressed to this point. Estelle is looking forward to reviewing the data with the full committee in Denver.

July Face-to-Face Meeting Agenda

The committee reviewed a draft of the agenda for the face-to-face meeting in Denver. Jerry asked Dave to add a discussion topic on the Taxpayer Blueprint report to the agenda. Time is limited during teleconferences so a discussion at the face-to-face meeting will allow more time for discussion.

Member Comments

No comments given.

Closing

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

Next Meeting: July 19 – 21, 2007 Denver, CO.



**Taxpayer Assistance Center (TAC)
Issue Committee Meeting Minutes
May 1, 2007**

Designated Federal Official

Judi Nicholas

Attendance

Jerry Fireman, Chair
Bob Haines
Bill Matheny
Jerry Melchior
Wayne Whitehead

Absent

Doug Wilhelm
Bruce Zgoda

Guests

Carol Hatch
Michelle Jones

Staff

Dave Coffman, Analyst
Marla Ofilas, Secretary

Welcome/Announcements

Jerry opened the meeting and thanked the members. Roll call was taken and a quorum was met.

Customer Survey Subcommittee Report

Dave reported that phase two of the survey will begin on May 14. Many of the volunteers from phase one have also volunteered to administer surveys during phase two. All marketing supplies, printed surveys and name tags are in the process of being boxed and mailed to the volunteer survey administrators.

Judi noted that the raw data from phase one has been entered on a spreadsheet for easier tabulation. An analysis is expected to take place after all the survey data has been entered. Carol expects the analysis to begin by the end of June, after all data has been received and entered. This should give ample time to consolidate the information for the face-to-face meeting.

Employee Survey Subcommittee Report

Carol reported that the employee survey has been completed. Michelle added that the survey must still be approved by the program owner, Labor Relations, and the employee's union. TAC employees will receive an e-mail from the TAC director, asking them to participate in the survey. Members discussed the survey and provided final comments and corrections.

ACTION: Carol will e-mail the final version of the employee



survey by the end of the day, May 1, 2007.

Some members were curious about a recent *Kiplinger Report* which mentioned the closure of some taxpayer assistance centers. Michelle will research this.

ACTION: Michelle will research the *Kiplinger Report* and report back to the members.

Program Owner Comments

No comments were given.

Member Comments

Members discussed the possibility of canceling the subcommittee meetings scheduled for May. This is mostly due to the customer survey needs for phase two and the fact that survey tabulations will not be available until the end of June.

DECISION: All agreed that the subcommittee meetings should be cancelled for the month of May.

ACTION: Dave will send an e-mail, letting everyone know that the subcommittee meetings for May have been cancelled.

Closing

Judi closed the meeting and thanked everyone for assisting in administering the customer surveys.

Next Meeting: June 5, 2007



**Taxpayer Assistance Center (TAC) Issue Committee Meeting
Teleconference Minutes
April 3, 2007**

Designated Federal Official

Judi L. Nicholas, TAP Program Manager

Attendance

Jerry Fireman, Chair
Bob Haines
Jerry Melchior
Wayne Whitehead
Bruce Zgoda, Vice-Chair

Guest

Carol Hatch

Staff

Dave Coffman, Program Analyst

Opening/Welcome

Jerry opened the meeting and reviewed the agenda. Dave took roll call and a quorum was met.

Customer Survey Subcommittee Report

Bruce explained that the February and March surveys have been completed and the staff has started consolidating the data. At this time, the subcommittee members are preparing for phase two of the survey. Phase two will take place between May 14 and May 25. All data collected from phase one and phase two will be reviewed and discussed during the July face-to-face meeting in Denver.

Dave commented that he e-mailed all members that participated in phase one of the survey. He asked them if they would be interested to volunteering for phase two. Roughly two-thirds that were contacted agreed to administer surveys for phase two. Dave also noted that over 500 surveys have been received from phase one.

Employee Survey Subcommittee Report

Bob stated that the subcommittee members met on March 30 to recommend changes to the draft employee survey. A new version has been created but the subcommittee has not had a chance to review it. When finalized, the final employee survey will be shared with the full committee for approval.

Carol added that the employee survey will be administered electronically. An e-mail will be sent to all employees with a link that will take the employees directly to the survey. The survey will be calculated automatically which will save staff both time and money.

Program Owner Comments



No comments were given.

Member Comments

Members agreed that it was a great meeting.

Judi offered that if there are new TAP members that volunteer for phase two of the survey, she will organize a survey orientation. TAP members that participated in the previous orientation provided good feedback and felt that the orientation helped prepare them to administer the surveys.

Closing

Jerry thanked the members and closed the meeting.

Next meeting scheduled for May 1, 2007.



**Taxpayer Assistance Center (TAC)
Issue Committee Meeting Minutes
March 9, 2007**

Program Owner

Estelle Tunley

Attendance

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

Absent

Jerry Melchior

Guest

Carol Dille Hatch
Gil Yanuck

Staff

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

Opening/Welcome

Jerry opened the meeting and welcomed the members, guest and staff. Marla took roll call and a quorum was met.

Customer Survey Subcommittee Report

Bruce reported that the 422 surveys were collected and 10% of those surveys were in Spanish. Bruce explained that the quota is 500 but feels that the committee will receive well over 600, after surveys are administered later in the month. The subcommittee will now focus on phase two which will be administered in May.

Dave commented that the survey volunteers reported great support from the local TAC staff. Jerry agreed and asked if thank-you letters should be sent to the offices where the surveys were conducted. Judi felt it was a good idea and suggested that the volunteers also receive a thank-you letter.

DECISION: The full committee agreed that thank-you letters should be sent to all who participated in the surveys. A thank-you letter will be drafted and sent to Jerry for his signature. Thank-you letters will be mailed out in May after phase two of the TAC surveys. Judi explained that Dave will start the process of securing dates for the May surveys. Once the dates are secured, Dave will schedule the volunteers and work with Michelle to notify the TAC offices.

Employee Survey Subcommittee Report Out

Bob informed the committee that he created a brief paragraph, explaining the purpose and providing instructions, which will accompany the employee survey. Carol noted that she is working on the online employee survey and expects to have the draft completed by March 20.



Program Owner Comments

Estelle expressed her appreciation with the progress of both surveys. Estelle also provided an update on the TAB report. The report has been completed and elevated to the Department of the Treasury and will be available to the public in April.

Estelle commented on an initiative, currently being reviewed by Field Assistance, involving customer wait times in TACs. The method for measuring wait times is not a truly comprehensive approach. A research organization or external vendor is being considered to help understand true wait time.

Closing

Jerry closed the meeting and thanked the members for their hard work.

Next Scheduled Meeting: April 3, 2007



**Taxpayer Assistance Center
Issue Committee
Teleconference Minutes
February 6, 2007**

Program Owner

Estelle Tunley (absent)

Attendance

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

Absent

Bob Haines

Staff

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

Guest

Carol Dille Hatch, TAS Research Analyst
Laureen Foard

Opening/Welcome

Judi opened the meeting and Jerry Fireman welcomed the members. Marla took roll call and a quorum was met.

Customer Survey Subcommittee Report

Bruce informed the committee that the mandatory orientation sessions, required of all volunteer survey administrators, have been delivered. These sessions were presented by both subcommittee members and TAP staff. Customer surveys will be administered the week of February 12 and then during another week in March. Wayne noted that he participated in the orientation sessions and provided guidance on what the TAP members should look for and what they should expect. Wayne felt that the most important point to remember is not to give out any tax information or advice while administering the surveys.

Judi explained that Dave will e-mail the name and number of an on-site contact to all survey administrators. Judi stressed the importance of calling the on-site contact prior to visiting the TAC. In addition, Judi informed the members that pens and tri-fold brochures may be the only available marketing materials. The clocks that were ordered as thank-you gifts have taken longer than expected and may not be available for the February surveys.

The members continued to discuss actions and logistics in administering the survey.

Employee Survey Subcommittee Report

The subcommittee met to discuss the status of the employee survey. Bill explained that Estelle wanted to avoid duplication of the yearly IRS all-employee survey and suggested that the employee survey developed by the committee mirrors the questions asked on the customer experience survey. The subcommittee also discussed the purpose and goals of the employee survey.



The next steps for the subcommittee are to review the IRS all-employee survey and a draft survey prepared by Jerry Fireman.

March Meeting Date

The members discussed selecting an alternate meeting date for their March teleconference. Currently, the next meeting is scheduled for Tuesday March 6; however, the staff may not be available on that day.

Decision: The members decided that their next meeting will be on Friday March 9, 2007 at 9:00 am Pacific time. Dave will check with the program owner and her staff to determine if this date/time fits within their schedule.

Member Comments

Jerry asked if there were additional comments. No additional comments were made. Judi thanked the members and closed the meeting.



**Taxpayer Advocacy Panel
Taxpayer Assistance Center
Issue Committee Meeting
January 12, 2007**

Program Owner

Estelle Tunley
Michelle Jones, TAC Analyst

Attendance

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

Absent

Wayne Whitehead

Guest

Carol Hatch, TAS Analyst
Laureen Foard, Local Taxpayer Advocate
Brant Goldwyn

Staff

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

Opening/Welcome

Judi opened the meeting and Jerry welcomed the members. Marla took roll and a quorum was met.

Customer Survey Subcommittee Report

Bruce reported on the last subcommittee meeting. At that meeting, the members felt they were not meeting their objective, which is to administer a survey that provides statistically valid results. The survey draft discussed at that subcommittee meeting only asked five questions and did not include questions about the participant's demographics. Questions were combined and re-worked, resulting in the thirteen question survey that Bruce presented to the full committee.

The full committee continued with a review of each survey question. Carol added that a serial number will be included at the bottom of each survey. Serial numbers will be designated based on office location. The reason for the serial numbers is to ensure that the sample represents the population.

Decision: The full committee agreed to use the current (thirteen question) survey.

Bruce continued by reviewing the talking points which will be delivered during the survey administrator orientation. Currently, 22 TAP members have volunteered to administer the taxpayer assistance center (TAC) survey. Each administrator will be required to attend a series of teleconference orientation sessions. Each volunteer administrator will have the opportunity to choose which teleconference they would like to attend, based on their schedule. The leaders of the orientation will include members of the TAP staff and the TAC committee members. The purpose of the orientation is to provide information in the following areas: what to expect, how to administer the survey, and what to do after all surveys are completed. Volunteer administrators should contact Dave



Coffman, TAP Analyst, if they have questions. To secure additional volunteers, Bernie will send out an e-mail asking TAP members for their assistance.

The committee members asked about the TAC survey locations. Judi explained that the locations will be based on the location of each survey administrator. Surveys will also be administered over several dates. Judi also informed the committee that the marketing materials will be mailed to each site and should be available to each volunteer.

Dave introduced the tic sheet which survey administrators will use to keep track of those that decline to take the survey, need a survey in a different language, etc. Members agreed on some minor wording changes.

Decision: The committee decided to use the survey tic sheet (after minor changes to wording are implemented).

Employee Survey Subcommittee Meeting

At this time, the subcommittee is waiting for final approval of the customer experience survey. The subcommittee intends to use the same questions but rephrase them to fit the TAC employee's experience when working with customers.

The subcommittee will meet on Tuesday January 16, 2007. This will be their first meeting since December.

Action: Dave will email the approved customer experience survey to the Employee Survey Subcommittee members.

Program Owner Comments

Michelle expressed her gratitude to all the members and felt she has learned in a short period of time.

Closing

Jerry thanked everyone for their participation and Judi adjourned the meeting.

Next Meeting

Tuesday, February 6, 2007