



2010 Meeting Minutes Taxpayer Assistance Centers (TAC) Project Committee Meetings

- December 9, 2010
 - November 23, 2010
 - October 26, 2010
 - September 28, 2010
 - August 24, 2010
 - July 27, 2010
 - June 27, 2010
 - May 25, 2010
 - April 27, 2010
 - March 23, 2010
 - February 23, 2010
-

Taxpayer Assistance Centers (TAC) Committee Teleconference Meeting Minutes December 9, 2010

Program Owners

- | | |
|-------------------|---------------------------------------|
| • Leslye Baronich | Director, Field Assistance |
| • Jane Brough | Supervisor, Technology and Measures |
| • Toni Horton | Tax Analyst |
| • Beth Braddock | Program Analyst |
| • Judith Adams | Chief, Financial Planning & Resources |
| • Sophia Francis | Program Analyst |

Committee Members Present

- | | | |
|---------------------------|-----------------|--------|
| • Baldwin, Barbara | Auburn, CA | Member |
| • Bohrer, Herbert | Springfield, ID | Member |
| • Cabusora, Haidee | New York, NY | Member |
| • Eik, Nancy | Missoula, MT | Member |
| • Janci, Gerald | Pittsboro, MS | Member |
| • Kosanovich, Matt | Columbus, OH | Member |
| • Levine, David | Reno, NV | Member |
| • McPeak-Tolle, Catherine | Plano, TX | Member |
| • O'Neill, Patricia | San Jose, CA | Member |
| • Palmer, George | McLoud, OK | Member |
| • Smith, Toni | Omaha, NE | Member |
| • Thompson, Tommy | Southaven, MS | Chair |

Committee Members Absent

- | | | |
|-----------------------|------------------|--------|
| • Acero, Antonio | Myrtle Beach, SC | Member |
| • Child-Tomie, Audrey | Brick, NJ | Member |



TAP Staff

- | | | |
|-----------------|---------------|-----------------|
| • Block, Roy | Milwaukee, WI | Manager |
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Program Analyst |
| • Robb, Patti | Milwaukee, WI | Program Analyst |
| • Gold, Annie | Milwaukee, WI | Secretary |

Welcome/Announcements/Review Agenda (Tommy Thompson)

Quorum met.

Tommy Thompson informed the panel members the mission for the Taxpayer Assistance Center (TAC) Committee is to improve customer service within the TACs.

Roy Block noted that this committee’s analyst is Ellen Smiley and Patti Robb is her back up. He added this is the only project committee that completes an annual report.

Panel Members and Staff Introductions

Approval of Minutes

Minutes Approved

**The 2010 Taxpayer Assistance Center Project Committee Report: (Thompson)
*Signs and Visual Communication***

The 2010 TAC Project Committee Report was distributed. Thompson explained it was approved by the Joint Committee in November 2010.

He explained the Program Owners met with us during the Annual Meeting to explain the project proposal, and then the members prepared a list of standardized questions to ask during their TAC visits. Smiley will provide you the name of the manager to contact in the TAC you choose to visit.

This year you will work on self-serve forms and publications provided in the TACs.

When the committee has their face to face meeting, recommendations will be formed and subcommittees appointed to write the recommendation, including rationales.

Program Owner comments: (Leslye Baronich)

Baronich thanked the committee for their past work. The signage issue didn’t sound like a big issue, but we knew at the 401 TACs it really is a big issue on a daily basis. The panel members found out very quickly how big this issue really is. Baronich added, as Chris Wagner stated, just because you don’t see implementation right away, don’t think the suggestions and input are not appreciated. It just takes time to implement, but we are listening. Baronich indicated she relies on and uses the TAC Committee a lot. When a decision was made by Commissioner Shulman to have a sign posted where to get forms, Baronich spoke up and stated how the TAC Committee has gone through extensive visits and analyzing regarding signs in the TAC and we don’t need another sign. They listened and agreed to come up with something else. The TAC Committee’s recommendations are used throughout the year.

Leslye handed out certificates of appreciation to last years TAC Committee panel members and is looking forward to next year.

Smiley handed out an article from the internet called the “Color: Psychology and Marketing” The document gives good information on what colors do what, and how to draw people in.



Brough noted the TACs get their signs by listening to people. A sign is developed, we ask for feedback from the field, and Sophia Francis determines if it is good or not. Then our graphic artist will come up with a sign which will work.

Roy Block went on to talk about the coloring and wording of the signs in the TAC. What Brough got out of the report was the signs outside and inside TACs is inconsistent. The Program Owners' understand this, but it will be a slow process to provide consistency throughout all the TACs. The overall statement in the TAC Report was there are just too many signs. This covers all the signs, whether they are TAC designated or other departments that have their sign displayed.

Herb Bohrer stated if you are going to have a sign, it has to catch somebody's attention. You just can't put up a sign and say the problem is solved.

Thompson stated the committee envisioned taxpayers walking into a TAC and a motion activated screen would come on, such as a talking poster, to tell the taxpayer what the TAC can help them with. If their concern was not mentioned, such as tax law questions, assisting with a payment, or if you don't have required documents, then you need to return home and call to make an appointment.

He added when taxpayers come in for assistance they want to see somebody face to face; they are not interested in reading a poster.

Baronich noted Thompson is right on point, however funding is an issue with the technology, but we are working on educating the taxpayers that visit.

IRS started initiatives to put televisions in TACs as taxpayers sometimes have to wait to be served.

Baronich stated she has directors who have oversight of five areas and they all use the feedback received from the TAC Committee.

Staff Roles and Responsibilities (Thompson/Block)

- **Methods of Communication**
- **Ground Rules and Telephone Etiquette**
- **Minutes/Minutes Approval**
- **Establish Meeting Quorum**
- **Meeting Assessment Surveys (How often)**

METHODS OF COMMUNICATION: The main method of communication is a teleconference call. In spring there will be a face-to-face meeting, which gives the panel members opportunities to interact. Communication can also be made by email and phone calls. Subcommittees can also communicate via telephone or if needed may set up a teleconference call.

GROUND RULES AND TELEPHONE ETIQUETTE: There is a monthly teleconference call and there is an expectation for everyone to be on that call. The ground rules and telephone etiquette have been provided at the bottom of the agenda. Please use the mute button to block out background noise when you are not speaking on the conference call and do not put the call on hold as your phone system may play hold music which disrupts the call.

MINTUES/MINUTES APPROVAL: Monthly minutes are approved on the teleconference call by consensus.

ESTABLISHING A MEETING QUORUM: Quorum will be Fifty percent (50%) plus one.

MEETING ASSESSMENTS SURVEYS: Meeting assessment will be done for face to face meetings.



Election of TAC Chair and Vice Chair (Thompson)

Chair – Herb Bohrer

Vice Chair – Nancy Eik

Establish Date and Time of Monthly Teleconferences (2011 TAC Chair)

The committee will have a teleconference meeting every fourth Tuesday at 2pm central time.

Establish Dates for Face-to-Face meeting (2011 TAC Chair)

The face to face meeting is schedule May 18 – 21, 2011. Travel day on Wednesday, May 18. Meet all day Thursday, May 19 and again Friday, May 20, and travel back the evening of May 20 if travel permits or travel back Saturday, May 21st.

Locations:

Denver, CO

Chicago, IL

Dallas, TX

San Diego, CA

Memphis, TN

TAC Issue for 2010 (Bohrer)

- **Committee Focus, Goals, and Objectives**
- **Background**

Beth Braddock presented two PowerPoint presentations. The first one explained the mission of field assistance, the structure, the breakdown of Areas across the country, explained what a TAC is, the key services provided, and the accomplishments.

The second PowerPoint was a presentation for the issue to be worked in 2011: recommend improvements for the self-service forms racks available in the TACs.

Herb Bohrer explained panel members are going to visit TACs and though our focus is the forms and publications self-serve racks, if there is anything else which catches your attention take note of it.

Take the time to talk to the TAC Manager and staff. Panel members can observe other organizations such as libraries to get a different perspective, but the focus is the TAC.

NOTE: Bank, Post Office and Library Program (BPOL) - what are their locations and find out their ground rules. We may see good practices.

Process: Based on the scope given, the committee will develop a list of questions. This should be available for the January teleconference meeting. We will hopefully approve the list of questions in January. Once this is done will start scheduling visits at the TACs. All field visits have to be done by the time we have our face to face meeting. At the face to face meeting we will work on recommendations, and complete a final report by November.



TAC Site Visits

- **Standardized Questions**

Smiley asked the TAC panel members to think about what kind of questions they may want to ask the manager and email them to her. She will include the list as pre-reads for the January conference call. In addition to sending questions, panel members should determine what offices they want to visit and let Smiley know. If you look at www.irs.gov under contact us, it will provide a list of the location of TACs by State. Brough noted they will let the office managers know panel members will be contacting them to set up a visit. Panel members will be provided with the name and phone number to reach the office manager of the TAC to be visited.

Note: When scheduling visits be aware the first two weeks of February are very busy, as well as April. Also schedule a visit on a Tuesday, Wednesday, or Thursday. Mondays and Fridays are also very busy days.

Closing/Meeting Assessment

Meeting Adjourned

Next Meeting will be Tuesday, January 25, 2011 at 1:00 pm Central Time.



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, November 23, 2010**

Program Owners

- Beth Braddock Program Analyst

Committee Members Present

- Bohrer, Herbert Springfield, ID Member
- Capehart, Craig Dallas, TX Member
- Eik, Nancy Missoula, MT Member
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- Monnier, David Indianapolis, IN Member
- O’Neill, Patricia San Jose, CA Member
- Spiotto, Ann Lincolnwood, IL Member
- Thompson, Tommy Southaven, MS Chair

Committee Members Absent

- Child-Tomie, Audrey Brick, NJ Member
- Conder, Dean Lakewood, CO Vice Chair
- McAulay, Louise Florence, SC Member

TAP Staff

- Smiley, Ellen Milwaukee, WI Program Analyst
- Gabriel, Lisa Milwaukee, WI Program Analyst

Welcome/Announcements/Review Agenda (Tommy Thompson)

Quorum met.

Approval of Minutes (Tommy Thompson)

Minutes are approved.

TAC Project Committee Report 2010: Signs and Visual Communication (Thompson)

• Great Job!

The Taxpayer Assistance Center (TAC) Committee Report is completed. Ellen Smiley noted the entire report is posted on TAPSpace, but is very slow to open. The report and the project referral will be reviewed by the Joint Committee today. Tommy Thompson noted this document could change the communication in the TACs. It will do exactly what we wanted it to do. He continued to say Ann Spiotto and Smiley deserve an extra pat on the back. We all covered a lot of ground, and lots of observations. We are losing a number of people on this committee such as Craig Capehart, Dean Conder, Dan Fretheim, Louise McAulay, Dave Monnier, Ann Spiotto, John Leggett and Tommy Thompson. Thompson’s one regret is he will not be able to work on next year’s project. Leggett stated this has been an excellent group to work with. Thompson added one spends a lot of hours working on a report and we have an excellent product and had great support with the Milwaukee staff.

Annual Meeting (Thompson)

• TAC Dinner

Smiley advised the Project Committee dinners are scheduled for Wednesday night, and suggested dinner at the Daily Grill. Reservations will be made for all of the TAC members unless you advise



Smiley if you are unable to attend or if you will bring a guest. Thompson, Fretheim and Spiotto will also joint the group for dinner.

Leggett asked what the new project will be for next year. Smiley noted it's about forms and publications availability in the TACs. Monnier suggested the TACs coordinate with the IRS which is on the path to eliminate the mailing of a lot of forms and publications. The documents which are no longer being mailed may need to be stocked better in the TACs.

Program Owner Comments (Braddock)

Beth Braddock is looking forward to the face-to-face meeting in December.

Thompson suggested the "Psychology of Color" document be available at the face-to-face meeting.

Office Updates (Smiley)

Smiley noted she is going to miss the panel members who are in their third year and not returning. It's been a great year!

Member Comments / Closing

Expressions of gratitude were made by the panel members and thanks to Thompson for his leadership. Leggett stated as a final note that great leaders provide great results and the other panel members agreed.

Meeting Adjourned

Next Meeting will be the Annual Meeting in Washington DC on December 9, 2010



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, October 26, 2010**

Committee Members Present

- Bohrer, Herbert Springfield, ID Member
- Capehart, Craig Dallas, TX Member
- Conder, Dean Lakewood, CO Vice Chair
- Eik, Nancy Missoula, MT Member
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- McAulay, Louise Florence, SC Member
- Monnier, David Indianapolis, IN Member
- O'Neill, Patricia San Jose, CA Member
- Spiotto, Ann Lincolnwood, IL Member
- Thompson, Tommy Southaven, MS Chair

Committee Members Absent

- Child-Tomie, Audrey Brick, NJ Member

TAP Staff

- Smiley, Ellen Milwaukee, WI Program Analyst
- Gabriel, Lisa Milwaukee, WI Program Analyst
- Haywood, Annie Milwaukee, WI Secretary

Roll Call (Annie Haywood)

Quorum met

Welcome/Announcements/Review Agenda (Tommy Thompson)

Tommy Thompson welcomed everyone to the call.

Approval of Final 2010 TAC Report

• **Review/Discuss Changes**

Ann Spiotto reported section IV has been added to the report regarding implementation of recommendations. This section discusses cost benefit analysis. There are some changes that can be done very little cost and some that could be very expensive. Implementation could be phased in over time. Spiotto stated if there is specific language to suggest forward to Ellen Smiley. Consensus was reached to leave this section in the report.

Various changes were discussed in formatting and positioning of information, but content remains unchanged. The committee agreed with the changes.

Approval of Minutes (Tommy Thompson)

Minutes approved.

Review Joint Committee Project Referral Form (Tommy Thompson)

This year all project committees complete a referral form for the Joint Committee to review their completed project. Various parts of the Executive Summary and information from the report were used to complete the referral form. The Joint Committee will review the referral on their November 23, 2010, Joint Committee call.



Office Updates (Ellen Smiley)

A Federal Register was filed for the November 23, 2010, TAC call, therefore there will be a short conference call.

Appreciation given to Ann Spiotto for all the hard work and dedication she has put into TAC. Good job everyone.

Meeting Adjourned

Next Teleconference Meeting Tuesday, November 23, 2010 at 1:00 pm CT



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, September 28, 2010**

Program Owners

- Toni Horton Program Analyst

Committee Members Present

- Capehart, Craig Dallas, TX Member
- Child-Tomie, Audrey Brick, NJ Member
- Conder, Dean Lakewood, CO Vice Chair
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- Monnier, David Indianapolis, IN Member
- Spiotto, Ann Lincolnwood, IL Member
- Thompson, Tommy Southaven, MS Chair

Committee Members Absent

- Bohrer, Herbert Springfield, ID Member
- Eik, Nancy Missoula, MT Member
- McAulay, Louise Florence, SC Member
- O'Neill, Patricia San Jose, CA Member

TAP Staff

- Block, Roy Milwaukee, WI Program Manager
- Smiley, Ellen Milwaukee, WI Program Analyst
- Gabriel, Lisa Milwaukee, WI Program Analyst

Guest

- Fett, Bob Burlington, VT Local Taxpayer Advocate

Welcome/Announcements/Review Agenda (Tommy Thompson)

There are no changes to the Agenda.

Approval of Minutes (Tommy Thompson)

Minutes approved.

Recommendation Subcommittees Current Activities and Next Actions:

- **Content / Format / Color of Existing Signs (Block)**

The Information provided is from the internet and books based on marketing and the psychology of color. The subcommittee viewed the different signs used in the 401 TAC offices and provided a brief over view of the purpose of the sign as well as any suggestions.

Tommy Thompson noted he will work on the executive summary and send it to Roy Block for review.

- **Develop Taxpayer Communication Assessment Process (Fretheim)**

IRS doesn't currently, to our knowledge, monitor their signs posted in the TACs. Simple ways to address this is by assessing the signs and determining what signs work and what signs do not. There are two ways to assess these signs. One is by including a question about the signs on the comment cards for the taxpayer when they visit the TAC. Second, the IRS has contracted outside survey companies to conduct surveys. Have the survey company ask independent questions regarding signs or go over the comments cards.



Ann Spiotto noted the draft TAC Report is available for suggestions. Spiotto suggested having four to five pages of signs side by side within the report. Block stated this will give a snapshot of their product. The signs can be added as an appendix. It was suggested in the electronic version of the report to have a link added to go to a web page for full viewing of the sign.

ACTION ITEM: Lisa Gabriel will work on adding four signs per page. Ellen Smiley will ensure each picture is 508 compliant.

Spiotto would like each subcommittee to review their portion of the draft report. Any comments regarding the report should be referred to Smiley. Smiley will add the page numbers in the table of contents. The report has been showing up in different formats for some members as there is some incompatibility between Word 2003 and Word 2007.

ACTION ITEM: TAC panel members please review report and provide feedback to Smiley. Report Cover Options 1 vs. 2 (Thompson)

- **Other Ideas**

Consensus is to use cover choice 2, but change the title from "Signs" to "Signs and Visual Communication"

ACTION ITEM: Gabriel will make corrections to cover and forward to Smiley.

Project Timeline: (Thompson)

- **Upcoming Events**
- **Date for Administrative Meeting to discuss any changes for the final report**

Spiotto will add recommendation 6 and 7 to the current draft of the TAC report. A call is scheduled for October 12, at 1pm central time to go over the draft TAC Report. The final TAC Report will be reviewed and discussed on the October 26th TAC conference call.

ACTION ITEM: Smiley will send out the updated draft TAC report to the panel members, which will include two pictures and recommendations 6 and 7.

Program Owner Comments (Horton)

Toni Horton noted she is back and will be reviewing with Beth Braddock and Smiley to help her get up to speed.

Office Updates (Block)

Block is looking forward to hearing the issue for next year's TAC project committee. He also encourages for those returning next year to consider the leadership roles for the TAC Committee. Smiley noted the updated TAC Roster was sent out due to the resignation of Patricia Davis. She resigned respectfully as she is very busy with her book and feels TAP deserves someone who is willing to dedicate the time to it that it deserves.

The final report will be mailed out to all the current TAC members as well as TAP Chairs and Vice Chairs so all Joint Committee members will have a copy before the Joint Committee call scheduled for November 23rd for their review and discussion. A hard copy as well as an electronic copy will be sent to Bob Fett.

Meeting Adjourned

Administrative Call is Tuesday, October 12 at 1:00 pm CST to review draft report followed by

Next Teleconference Meeting Tuesday, October 26, 2010 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, August 24, 2010**

Program Owners

- Beth Braddock Program Analyst

Committee Members Present

- Bohrer, Herbert Springfield, ID Member
- Capehart, Craig Dallas, TX Member
- Child-Tomie, Audrey Brick, NJ Member
- Conder, Dean Lakewood, CO Vice Chair
- Davis, Patricia Mitchellville, MD Member
- Eik, Nancy Missoula, MT Member
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- Monnier, David Indianapolis, IN Member
- O'Neill, Patricia San Jose, CA Member
- Spiotto, Ann Lincolnwood, IL Member
- Thompson, Tommy Southaven, MS Chair

Committee Members Absent

- McAulay, Louise Florence, SC Member

TAP Staff

- Block, Roy Milwaukee, WI Program Manager
- Smiley, Ellen Milwaukee, WI Program Analyst
- Gabriel, Lisa Milwaukee, WI Program Analyst

Guest

- Fett, Bob Burlington, VT Local Taxpayer Advocate

Welcome/Announcements/Review Agenda (Tommy Thompson)

Tommy Thompson noted the committee has accomplished a lot of work based on all the recommendations included in pre-reads. Thompson reminded everyone about the timeline: September 1st all recommendations with rationales need to be completed; September 28th is the next committee conference call; and October 12th the final draft of the complete report will be completed.

Ann Spiotto, with review from Ellen Smiley, will combine the recommendations into a final draft report.

If panel members have any suggestions regarding the recommendations reviewed today, please forward comments to Smiley and she will collect and refer the comments to the chair of the subcommittee for the specific recommendation.

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes approved

Recommendation Subcommittees Current Activities and Next Actions:

- **Eliminate Unnecessary Signs – Completed**

John Leggett noted he had nothing else to add.



- **Message Point Sets for Each Type of TAC (Bohrer)**

Herb Bohrer received a couple of comments on the report. He will incorporate suggestions into the recommendation and send the final version to Smiley.

- **Full Utilization of Q-Matic (Child-Tomie)**

Audrey Child-Tomie explained the report suggests TAC Managers use the Q-Matic to its fullest potential. Taxpayers need to be educated how to use the Q-Matic. Q-Matics need to be put in a standard location and number of choices for topics should be reduced from ten to five. If too many choices are available, the taxpayer will select the "other" topic. Another suggestion is TACs should not use a Q-Matic in an office which does not have a greeter.

- **Use IRM for Local Signs / Modify Process for Short Term Signs (Spiotto)**

Ann Spiotto advised the report indicates Managers should follow the IRM (Internal Revenue Manual), however, the IRM process should be modified to:

- Provide an exception to the IRM process to permit the use of locally generated signs on a temporary basis pending approval by Headquarters. The locally prepared sign will follow a standardized template.
- Provide an exception to the IRM process for signs needed for a short period of time (e.g., one week or less), which may be posted without approval from Headquarters for such period.
- Provide a list of the signs or types of signs provided by other groups or governmental agencies which TAC offices are authorized to display. Alternatively, prohibit the TACs from posting such signs or provide an exception to the IRM process to permit the posting of such signs at the TAC Manager's discretion.

Beth Braddock noted the TAC Managers should be displaying all signs which are required and not every approved sign is a required sign.

- **Alternate Communication Methods (O'Neill)**

Patricia O'Neill stated at the TAC face-to-face meeting in Milwaukee they discussed enhancements. The recommendation also addresses different methods of communication such as books, posters, kiosks, and televisions in the TACs.

- **Content / Format / Color of Existing Signs (Block)**

This recommendation will be completed next week.

- **Develop Taxpayer Communication Assessment Process (Fretheim)**

The subcommittee has not discussed this recommendation. Dan Fretheim advised it would be completed by the September 1st deadline.

- **Display External TAC Signs (Monnier)**

Dave Monnier requested comments for this recommendation be forwarded to Smiley.

- **Senior Management Requirements for TAC Site Visits Using Checklist (Bohrer)**

Herb Bohrer explained he sent the draft recommendation to the subcommittee for review. Bohrer would like the subcommittee to review the report and send their comments to him. Patricia Davis indicated she did not remember receiving the draft. Smiley will email the draft recommendation to Davis.

ACTION ITEM: Smiley to email Davis the draft recommendation "Senior Management Requirements for TAC Site Visits Using Checklist".

Many committee members recommended not listing the location of the TACs observed as part of the report.



Smiley advised the action item from the last teleconference was regarding the civil rights sign. Per the IRM, the sign is required.

Office Updates (Block)

Roy Block advised Shawn Collins has made the announcement to Program Owners requesting projects for 2011 for TAP to work on.

Braddock stated she is back from her detail, but Toni Horton will continue to be involved with the TAC Project Committee.

Meeting Adjourned

Next Teleconference is Tuesday, September 28, 2010 at 2:00 pm EST

1:00 pm CST / 12:00 Noon MST / 11:00 am PST



**Taxpayer Assistance Centers (TAC) Project Committee
Teleconference Meeting Minutes
Tuesday, July 27, 2010**

Program Owners

- Toni Horton - Program Analyst
- Beth Braddock - Program Analyst

Committee Members Present

- Capehart, Craig - Dallas, TX - Member
- Child-Tomie, Audrey - Brick, NJ - Member
- Conder, Dean - Lakewood, CO - Vice Chair
- Davis, Patricia - Mitchellville, MD - Member
- Eik, Nancy - Missoula, MT - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- Spiotto, Ann - Lincolnwood, IL - Member

Committee Members Absent

- Bohrer, Herbert - Springfield, ID - Member
- O'Neill, Patricia - San Jose, CA - Member
- Thompson, Tommy - Southaven, MS - Chair

TAP Staff

- Block, Roy - Milwaukee, WI - Program Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Program Analyst
- Haywood, Annie - Milwaukee, WI - Secretary

Guest

- Fett, Bob - Burlington, VT - Local Taxpayer Advocate
- Tolman, Herbert - Public

Welcome/Announcements/Review Agenda (Dean Conder)

The meeting was opened with a welcome by Dean Conder. Tommy Thompson was unable to attend due to unforeseen circumstances.

Roll Call (Annie Haywood)

Quorum met

Approval of Minutes (Dean Conder)

Minutes Approved

Recommendation Subcommittees Current Activities and Next Actions:

Eliminate Unnecessary Signs

John Leggett advised a draft of this recommendation was included in the pre-reads. The overall perception is the clutter caused by the signs. Conder stated by the time a taxpayer gets to the TAC, it is too late displaying the sign "In this Office, We Can" and agrees it should be eliminated. The question was asked if there is a way to get the information out to taxpayers prior to their visit to a TAC. Patricia Davis indicated there has been no discussion on it. Ann Spiotto pointed out it was discussed at the face-to-face meeting what information was available online. Ellen Smiley agreed that online it mentions what you can and can not bring. It has been suggested to eliminate The Civil Rights poster



but there are questions if Internal Revenue Service (IRS) legal counsel must approve this and if so, who will do this? Roy Block advised it would be part of the report and Field Assistance would follow through with recommendations. Smiley questioned if the Civil Rights poster had been eliminated? Beth Braddock was not aware of it being eliminated. The recommendation was approved by the committee.

ACTION ITEM: Smiley and Braddock will find out if the Civil Rights poster was eliminated or not.

Message Point Sets for Each Type of TAC

Herb Bohrer sent a draft via email and it is still under discussion. One item discussed is a large TAC where there is a greeter would not need many signs. In the smaller TACs more signs providing more direction would be needed. This recommendation will be discussed next month. offices a small sign would be posted.

Full Utilization of Q-Matic

Audrey Child-Tomie stated mastering the use of the Q-Matic and how it will help taxpayers leads to possible education on working the Q-Matic. While visiting the TAC office in Milwaukee a taxpayer was unsure how to use the Q-Matic and was assisted by a panel member. Taxpayers do not know how to use it. Child-Tomie advised a draft recommendation will be ready for the August call.

Use IRM for Local Signs / Modify Process for Short Term Signs

A subcommittee conference call has been scheduled for the second week in August. A draft write up will be prepared for discussion on the August call. Would the receiving offices have to get prior approval for signs they may want to use and follow a template. This would not leave it up to their discretion.

Alternate Communication Methods

Patty ONeill informed the committee a subcommittee call has been scheduled for August 3, 2010 to discuss this recommendation and a draft recommendation will be ready discussion on the August call.

Content / Format / Color of Existing Signs

Roy Block advised the subcommittee is moving forward with content.

Developing Taxpayer Communication Assessment Process

The subcommittee anticipates having a draft for discussion during the August meeting.

Display External TAC Signs

Dave Monnier advised the subcommittee is trying to set up a conference call to discuss this recommendation. Currently, the signs outside are not good. The question is how to get past that. On the internet you should have a picture of the building when using maps to find how to get to an office. Beth Braddock added if you go to the zip code locator on irs.gov it links to a map but it doesn't give a picture of the building. The subcommittee members will discuss the recommendation and provide a write up by September.

Senior Management Requirements for TAC Site Visits Using Checklist

The subcommittee has not discussed the recommendation yet, but will before the next committee call.

Office Updates

Roy Block advised we are in process of finalizing the new panel members for the upcoming year. Smiley reminded the panel members the lead of each subcommittee is responsible for being the host for any subcommittee conference call. In addition, please advise Smiley when a subcommittee call has been scheduled to ensure the time slot is available.

Member Comments

Nancy Eik stated in Billings Montana the sign for "The IRS Speaks Your Language" does not include Native American language. There is a large Native American population in this area and there are many negative comments about this. The question came up if there is an issue regarding a TAC



complaint, what committee is assigned to work it? Smiley advised if there is a TAC complaint, the issue is assigned to her and the complaints are forwarded to Field Assistance on a monthly basis. Remember all posted signs are required to have approval and it is stated in the IRM signs need to be approved first. Leggett added our charter is to make recommendations independent of the IRM.

Meeting Adjourned

Next Teleconference is Tuesday, August 24, 2010 at 2:00pm EST / 1:00pm CST / 12:00 Noon MST / 11:00am PS



**Taxpayer Assistance Center (TAC) Committee
Face-to-Face Meeting Minutes
June 27 - 29, 2010**

Program Owners

- Leslye Baronich - Director, Field Assistance
- Jane Brough - Financial Management Specialist
- Toni Horton - Policy Analyst
- Frances Florence - Policy Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Capehart, Craig - Dallas, TX - Member
- Child-Tomie, Audrey - Brick, NJ vMember
- Davis, Patricia - Mitchellville, MD - Member
- Eik, Nancy - Missoula, MT - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- O'Neill, Patricia - San Jose, CA - Member
- Spiotto, Ann - Lincolnwood, IL vMember
- Thompson, Tommy - Southaven, MS - Chair

Committee Members Absent

- Conder, Dean - Lakewood, CO - Vice Chair

TAP Staff

- Block, Roy - Milwaukee, WI - Program Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Haywood, Annie - Milwaukee, WI - Secretary

Welcome/Announcements/Review Agenda (Thompson)

The meeting was opened with a welcome to Milwaukee by Tommy Thompson followed by an introduction of Panel Members, Staff, and Program Owners.

Roll Call (Haywood)

Quorum met

Approval of Minutes (Thompson)

Minutes Approved

Field Assistance Update on Implementing Recommendations from the 2009 TAC Committee Report (Brough)

A power point presentation by Jane Brough provided an update on implementation of each of the recommendations from the 2009 TAC Report.

Recommendation 1: Form 2290 Heavy Highway Vehicle Use Tax Payments:

- National Guidance was distributed to the field advising Individual Taxpayer

Advisory Specialists (ITAS) to inform Form 2290 taxpayers of the e-file options and the electronic payment options, such as EFTPS.

- Testing an alternative site in West Virginia to accept Form 2290 at the Department of Motor Vehicle location.



Recommendation 2: Payment Drop Boxes

- Explored the possibility of reintroducing the payment drop boxes, however, the

Physical Security Emergency Preparedness (PSEP) recommended that boxes not be installed.

- Developing a payment envelope that will allow a taxpayer to complete an envelope then turn in the payment to ITAS.

Recommendation 3: Payment Using Form 8109, Federal Tax Deposit Coupon, for all Taxpayers

- Modified current procedures to permit TAC employees to provide blank 8109-B forms to taxpayers.
- Continue to advise taxpayers of the payment option through EFTPS, since the Form 8109-B is scheduled to be obsolete on 12/31/2010.

Recommendation 4: Forms Used in the Payment Process at the TACs

- Testing 10 locations with the Remittance Strategy for Paper Check Conversion (RS-PCC) application.
- Checks and money orders are scanned at the point of receipt.
- Currently a team is reviewing the courier procedures in the TAC for opportunities to increase efficiencies.

Recommendation 5: Q-Matic and Wait Time

- Developed multiple Q-Matic and Business Objects courses for Area Analysts and Managers to improve use of Q-Matic reports.
- Funding for new Smart Printers to convert Q-Lite sites (196 Q-Lite) has been approved.
- Funding requested for a new dashboard with enhanced report capabilities to access data for managers.

Program Owner Opening Comments/Review of Assignment (Horton / Brough)

Jane Brough pointed out all the TAC signs posted around the room. Ultimately, people do not read the signs even though it is to their benefit to read them. The Wage and Investment (W&I) commissioner said to place TVs in the TAC to get this information out to taxpayers. Field Assistance is asking the TAC Committee's advice on ways of improving signs and what signs are really needed and which signs are not.

TAC Visits

Thompson pointed out the panel members visited TACs from January through June to observe the signs, discuss them with the employees and / or manager, and offer suggestions to improve the signs. Thompson noted there are project committees where only two or three people do all the work. The TAC Committee does not operate this way. Each panel member contributes their reviews, suggestions, and all work together on conclusions and recommendations to provide a final report.

- **Observation Review(s)**

Hattiesburg and Jackson, MS

Thompson stated he visited two TACs, one in Hattiesburg and the other in Jackson, MS. The same manager is assigned to both offices. There were no signs on the exterior of the building to indicate there were any IRS offices in the building. Once inside, the forms and pub rack was very neat, orderly, and well stocked. The office was a very small and there was no assistant at the desk. There was a computer generated sign that said, "Do Not Yell Across the Room for Assistance. Sign in and be seated. Someone will be with you in a few moments". With no visible person available, the customer would benefit from reading the sign.

The small office had too many signs: several no cell phones and no camera signs. The office did close for lunch but there were no signs to indicate the closure.



The manager was not available, but an employee answered questions. She did not think anyone read the signs. Their questions could have been answered if they would read the signs, but instead they wait to ask their question.

The employee stated every non-English speaking customer that came to the office had an interpreter with them. Several other panel members indicated this was conveyed to them as well. Brough said all of the signs are being converted to both English and Spanish.

Thompson advised overall the taxpayers thought the employees did their job well.

A question was asked if it was a mandate from Congress or IRS to have all signs printed in Spanish? Brough responded it's not a regulation or policy statement, but files are not kept longer than three years so is not sure.

It was pointed out that each TAC should be able to decide what signs would work best in their TAC and what language(s) should be used.

Panel members stated it may be a good idea to have the signs outside the door. If the signs were taken away what differences would it make? Improving the signs does not make a difference if customers are not reading them.

Audrey Child-Tommie asked if any of the customers had a problem with signing their names and asked if this was a privacy issue. Block asked why would a taxpayer need to list their address on the sign-in sheet. Collecting information they do not need, is this policy? Brough advised it was not policy, they were not aware this was happening. She added a telephone call will be made to the Area Director and this will be stopped. It is not an authorized procedure.

In Jackson, MS, parking is difficult to find. They have security screeners, but when asked if they knew where the TAC office was, they said no. Once inside the TAC, the signs were clear. The TAC office and staff were great. The Q-Matic did not work and their wait time was about 20 minutes. The manager thought the best service was face to face and some of the signs could be eliminated, but was uncertain which ones. Maybe larger signs, with more color and different shapes would encourage taxpayers to read the signs. It was very noticeable that the customers were using their cell phones, texting, and children were eating in spite of the no cell phones and no food signs.

Freehold, NJ

Audrey Child-Tomie visited the Freehold office; however the manager was not present as he listed the wrong appointment time. The outside signage to direct you to the office was great. Once inside, it was not clear where to go or what to do. Customers in the waiting area explained to take a number. The representative would then call out "Who's next?" which was unprofessional. There were no public restrooms. A woman who had her child with her was very upset by this. There was a sign near the entrance that listed telephone numbers to call if you had an appointment, but it was behind a partition and not visible.

Child Tomie said they do have a drop box for payments. Brough added the boxes were supposed to be removed. There was no privacy. The conversations with customers were overheard. Conclusion is signs are not being read and need to have better placement of signs.

Tommy asked the panel members how many offices were the Q-Matics not working or not even in the office. Jane stated all the offices do have a Q-Matic or Q-Lite, but have had many reports of the Q-Matics not working. The Q-Lite captures the numbers served.

ACTION ITEM: Brough will provide a report to the committee.

Bohrer asked if there were statistics on who was going to the TACs. Brough advised 42% of people going to TACs are first time visitors. 49% have visited TACs multiple times in the past two years. TACs have a high satisfaction rate from taxpayers. Regulars come in to make payments added Patricia O'Neill. John Leggett added all the customers wants is to talk with someone. No matter how many



times you the information is on a sign, they want to talk to someone.

ACTION ITEM: Brough will provide the Customer Satisfaction Report.

Craig Capehart stated of all the observation reviews, 17 of the reports indicate nobody reads the signs. Only one report indicated taxpayers read the signs.

Missoula, MT

Nancy Eik visited the Missoula TAC office and said the biggest problem is the State and Federal offices are on the same floor, causing confusion for the taxpayers. There is an elevator but it is hidden and if you did not know it was there you would miss it. Several signs are posted outside the door to the TAC advising no cell phones and no eating or drinking. A phone is also there but no indication what it is for. The Q-Lite machine is right inside the door. There are no trash cans. A guard is there but reading a book. There is a telephone to call the 1040 number.

Louise McAulay said the original problem with the cell phones was taking pictures and they were simply too noisy. Herb Bohrer added when the cell phone rings everything else stops. Block asked if there was a budget for the signs. Brough advised there is no specific budget for signs; signs are ordered as they are needed.

La Crosse, WI

Dan Fretheim visited the La Crosse TAC office. There are no signs outside the building indicating the TAC was located in the building. This is a common complaint received from the taxpayers. The two signs inside the building on the first floor directing a person to the TAC were not easily visible. The Q-Lite was not plugged in. The employee explained it never worked and never connected to the computer. Brough added that once Smart Two is available it will connect the Q-Lites to the computers.

Thompson made note that by reviewing the reports we are seeing the same problems across the country. Herb Bohrer stated we need to develop what the findings are associated with these observations. Are there any guidelines on what can put on the outside of the buildings? There should be a sign if it is a Federal Building. If the space is leased, it is up to the lessor.

Denver, CO

Tommy looked over Dean Conder's report; he visited the TAC office in Denver. Adequate space for forms and pubs were noted. There were no signs in the lobby but a kiosk for directions to the TAC was there. The website is the primary signage to gain access to addresses of IRS offices, location of forms, TAC offices, what services they provide, etc.

On www.irs.gov, it is 3 to 4 links to get to TAC information. Leggett stated he found it to be very easy. Leslye Baronich added not all TAC offices have guards. Cell phone use is not a national policy, it is left to the local offices if cell phones can be used or not. The campus locations do not allow you to bring in cameras or cell phones with cameras. Ann Spiotto asked what difference it makes if you are not disturbing others. In the small offices it is a problem so signs are needed. Ellen Smiley added there is a general statement on www.irs.gov regarding use of cameras and cell phones. Block added a person sitting in a TAC doesn't want to be there and they have to listen to all the interruptions. We are in an environment where it is a part of people lives; they use the cell phones everyday.

- **Overview of Prior Observations**

New York City, NY

Craig Capehart reported no one reads the signs. Dark hallways prevented the signs from being noticeable. The office is huge with plenty of chairs, but only a few taxpayers were there. In the waiting areas signs were visible too far away. The assistor's cubicles have hand made signs displayed. There were no televisions and the managers do not want any.



Poughkeepsie, NY

The assistants sit side by side and there is only a wall between them. There was a Q-Matic but it wasn't being used. Capehart's perception is customers get excellent service.

Leslye Baronich explained there are large, medium, and small TACs. Policy applies to the small as well as the large TAC offices. The small offices have the flexibility to run the office suitable and to adapt to the situation they deal with on a daily basis. It is stressed no hand made signs. The TAC office needs to elevate their request for signs in order to have the signs professionally made.

Schiller Park, IL

Ann Spiotto visited the Schiller Park TAC office. No one seems to read the signs except for the TAP members. There seemed to be concern with the privacy of taxpayers and the recording of conversations. The talking posters were a concern with the children making it talk and the noise would be a factor. The manager suggested making the signs more eye catching and placed inside the lobby. There were no televisions in the waiting area.

Boise, Idaho Falls, Pocatello, ID and Ogden, UT

The parking lot has a guard who alerts customers to leave cameras, knives, etc. in the car. In Ogden you get in the building after screening. There is a little sign that says IRS. There is a Q-Matic system in Ogden without a greeter. The manager is very confident and knowledgeable of what is going on. IRS could learn something from the Social Security office. The first thing you do when you walk into the Social Security office is talk to someone.

Silver Spring and Landover, MD

Patricia Davis visited two TAC offices in Maryland. Both the managers and assistants were knowledgeable. They thought any video should be in both Spanish and English. Their concern was with the volume. They suggestion of having an information booklet on what the IRS can do for taxpayers would be a good idea. There were plenty of signs. No one read the signs. People stood in line rather than read the signs.

Thompson summarized with some general notes:

- 20 to 25 managers noted the signs are not being read
- Spanish speaking people generally bring and interpreter with them
- The signs were too many, too cluttered, ill placed
- Signs were taped to the walls
- Signs available but not a way to display them without appearing tacky
- Q-Matics are available but not used
- External signs not visible or too small
- Signs are not read, therefore do not spend any more money on signs
- May need clarification on signs
- People may have problems but are not reading the signs
- Add security information to the website
- Problem with color and size of signs
- What kind of image we want to project
- Security guards necessary and could be helpful in screening and greeting

Color Psychology

Block explained the staff travels often. Smiley was in the airport and noticed the signs were simple pictures with arrows. He explained people respond to color. IRS is applying this principle to a degree when they want you to focus on the sign. A picture of a cell phone with an arrow through it may work better. To support the Form 2290 campaign we thought the use of color and a picture would draw people to read the sign. The idea is to get the customer to understand what we will do and what we won't do. For example, one talking poster with symbols such as a dollar sign (\$) for making payments or a picture of a tax return if you want a transcript of your account. Symbols and color can direct people. People notice signs when there are pictures, arrows, colors, and few words. Child-Tomie



mentioned hospitals use this process of fewer words and more pictures and it works. No one is reading the signs so they have adopted a softer way. Thompson said it is important to remember symbols, color and direction.

Local Taxpayer Advocate (LTA)

Barbara Johnson, LTA, along with Mary Ann Delzer, Taxpayer Advocate Group Manager (TAGM) provided a brief overview of the type of cases, case load, and problems they see in the Taxpayer Advocate Service (TAS). The most common case issue is The First Time Homebuyers Credit (FTHBC). There were a lot of fraudulent returns filed claiming the FTHBC, which has caused a backlog as most will be audited. The FTHBC and collection cases make up the bulk of TAS inventory. Homebuyer Credit and Collection is the bulk of our inventory.

Conclusions and Recommendations (Bohrer)

Herb Bohrer led the discussions about the observations, concerns, and issues with the signs currently used in the TACs. Bohrer thanked Baronich and Brough for their open discussions with the committee. He also stated the assistants in the TACs are professional, helpful, receptive, and answered our questions.

Conclusions:

- Too many signs that nobody reads
- Clients need directional and operational information
- There is little use of alternative communication methods
- No assessment method exists to monitor client communication effectiveness. No requirement exists for senior manager visits to all TACs on a routine basis

Recommendations:

- Eliminate all unnecessary signs
- Determine message point sets for each type of TAC
- Encourage full utilization of Q-Matic in all TACs
- Use the established Internal Revenue Manual (IRM) process for locally prepared signs. Modify the process to provide sign templates for use in creating interim short term use signs
- Consider use of alternate communication methods such as electronic media, talking posters, kiosks, TV's, etc
- Review existing signs for content, format, and color
- Develop a taxpayer communication process
- Display TAC signs external to buildings where possible
- Implement a requirement a requirement for senior management visits to all TACs on a recurring basis. Includes a checklist required to be sent to director and headquarter staff.

Program Owner Comments (Baronich)

Leslye Baronich thanked the panel members for their observations, thoughtful considerations, and hard work in deciding the conclusions and recommendations.

TAC Report Timeline (Thompson)

July and August 2010 the subcommittees will set up time to discuss, work, and complete their issue. September 1, 2010 have issues and recommendations with rational sections completed and submit your section for all to review. Subcommittee chairs please email these completed write ups to Smiley, who will distribute to the committee for review.

September 28, 2010 monthly TAC call to discuss any changes to the issue sections.

October 12, 2010 final draft of the complete report due for all to review.

Friday, October 15, 2010 1:00 pm CT, teleconference to discuss any changes to the final report.



October 26, 2010 monthly TAC call for approval of the final report.

November 23, 2010 Final Report presented to the Joint Committee on JC monthly teleconference.

Subcommittee Breakout (All)

- Organize
- Begin work on specific issues

Office Updates (Block)

Block advised the staff has been busy during June with three face-to-face meetings and interviewing TAP applicants.

Meeting Adjourned

Next meeting July 27, 2010 at 1:00pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, May 25, 2010**

Program Owners

- Toni Horton - Program Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Child-Tomie, Audrey - Brick, NJ - Member
- Condor, Dean - Lakewood, CO - Vice Chair
- Davis, Patricia - Mitchellville, MD - Member
- Eik, Nancy - Missoula, MT - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- O'Neill, Patricia - San Jose, CA - Member
- Thompson, Tommy - Southaven, MS - Chair

Committee Members Absent

- Capehart, Craig - Dallas, TX - Member
- Monnier, David - Indianapolis, IN - Member
- Spiotto, Ann - Lincolnwood, IL - Member

TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Program Analyst
- Haywood, Annie - Milwaukee, WI - Secretary

Welcome/Announcements/Review Agenda (Tommy Thompson)

The meeting was opened by Tommy Thompson. The agenda was addressed and no revisions noted.

Roll Call (Annie Haywood)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes Approved

TAC Visits

- **Observation Review**
- **Boise, Idaho Falls, Pocatello ID and Ogden, UT**

Herb Bohrer stated the signs are not read in these offices. There are very few observable signs in place. Several locally prepared signs were posted, generally on the walls. In Boise, the individual cubicle walls have some signs posted but are blocked when customers sit in front of them. Unless you ask them to move you would not be able to read them. The signs have become wall paper in the Pocatello office. There are too many of them in one area and they are too close together. This discourages the customers from reading. Also, it is noticeable when a cell phone rings, everything stops. This is very disruptive. The local manager, Ryan Kinikin, prepared a computer based presentation, which is not a final project, but an interesting approach to providing taxpayers information. There were some educational signs on the First Time Home Buyer Credit that were helpful. There were external signs in Boise, Pocatello, and Idaho Falls identifying the IRS building, but



none in Ogden. In Ogden, you had to look at the locator board to find where the TAC was located. When you park your vehicle in the parking area in Boise, a security guard will let you know there is a TAC office in the building. Ogden does not have a security guard for questions. You would have to find out what you can or can not take in the office after you are in the screening process. Thompson suggested that we go back to the first step; re-writing the signs to make simpler messages. What exactly do you want a patron to know prior to speaking with a TAC person? We do not want to keep adding signs without giving a clear message. We will discuss this at our face-to-face meeting in Milwaukee.

- **Silver Spring and Landover, MD**

Patricia Davis visited both the Silver Spring and Landover, MD offices, which are managed by the same manager. The Silver Spring building has two entrances with signs directing you to the TAC office. The Landover office has no signs that give directions. Someone would have to literally tell you how to get there. Silver Spring has signs available in both English and Spanish that are visibly displayed. Both offices reported they have very little reading of the signs by the customers. There is a Q-Matic system in place and the customers will stand in line to ask a question rather than read the signs that have the answers fully displayed. The offices have no problems with getting the signs they need from a central location, as it is cost effective to do so. We spoke about videos being played in the offices. Some cautious optimism was displayed in reference to the constant noise. The question was asked, "Would there be English and Spanish versions running?" The consensus is it would provide useful information relative to what services are available within the TAC office.

John Leggett added a suggestion to have the TV on mute. Maybe pamphlets would be helpful because reading the signs are not beneficial.

Audrey Child-Tomie asked if the Q-Matic system was visible as you come in or do the customers have to look for it. Patricia added they had to look for it. All agreed it should be in a place that would be obvious to all.

- **Myrtle Beach and Florence, SC**

During a visit to the Myrtle Beach office, Louise McAulay noticed no signage outside of the building, and the street number was very small above the door. The office closed for lunch and re-opened with a large gathering of people waiting at the door. Noticing the time had passed her appointment time of one o'clock, McAulay had to knock on the door for entrance. Louise noted this was the smallest office she had ever seen. Further conversation with the manager only showed the manager did not want to address the fact that the signs were not being utilized. These signs should be displayed outside on the walls outside of the TAC, not inside. The observance is that people are focused on what they have to do and do not read the signs. The Florence office did however have signs posted outside on the doors to the TAC. There were security guards who were very strict. Cell phones are not allowed in the building. The manager did not think Spanish signs would benefit the customers. Perhaps Hispanic customers are not in the area.

- **Identify common observations and concerns (Thompson)**

The question was presented, "Why don't people read the signs?" How can TAC offices display the same message yet tailor messages for their office. This will be discussed during the face-to-face meeting in June.

The color of the signs could be a factor as to why they are not noticeable. The display should be eye catching.

The business plan slide presentation came from Ryan Kinikin. Whether or not this is definite is still to be determined. It is believed the slide presentation would be used system wide. Roy Block pointed out the talking poster previously discussed explains what the TAC will and will not do. Bob Fett interjected his observation when he worked in TAC he noticed a large number of people who are not able to read. He suggested a need for other methods of communication. With literacy being a wide spread problem, a solution to dealing with the situation must be derived.



Office Updates

Block advised the Milwaukee staff will be conducting interviews during the first and fourth week of June for possible alternate panel members.

Meeting Adjourned

Next meeting: Face-to-Face in Milwaukee June 27 – 29, 2010 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, May 25, 2010**

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- Toni Horton - Program Analyst

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- Block, Roy - Milwaukee, WI - Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
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Welcome/Announcements/Review Agenda (Tommy Thompson)

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Roll Call (Annie Haywood)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes Approved

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**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, April 27, 2010**

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- Toni Horton Program Analyst

Committee Members Present

- Capehart, Craig Dallas, TX Member
- Child-Tomie, Audrey Brick, NJ Member
- Eik, Nancy Missoula, MT Member
- Fretheim, Daniel Decorah, IA Member
- Leggett, John Canterbury, NH Member
- McAulay, Louise Florence, SC Member
- Monnier, David Indianapolis, IN Member
- O'Neill, Patricia San Jose, CA Member
- Spiotto, Ann Lincolnwood, IL Member
- Thompson, Tommy Southaven, MS Chair

Committee Members Absent

- Bohrer, Herbert Springfield, ID Member
- Conder, Dean Lakewood, CO Vice Chair
- Davis, Patricia Mitchellville, MD Member

TAP Staff

- Block, Roy Milwaukee, WI Program Analyst
- Smiley, Ellen Milwaukee, WI Program Analyst
- Gabriel, Lisa Milwaukee, WI Program Analyst

Guest

- Fett, Bob Burlington, VT Local Taxpayer Advocate

Welcome/Announcements/Review Agenda (Tommy Thompson)

Beth Braddock is on a detail for the next 60 days. Toni Horton, who is a Field Assistance Program Analyst, will be acting for Braddock during this time. Horton has been with the service for 18 years. She was a Revenue Agent for 11 years then worked in the Taxpayer Education Department before working in Field Assistance.

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes Approved

TAC Visits

Observation Review

Poughkeepsie, NY

The Poughkeepsie TAC is a very small office which contained no more than five chairs in the waiting area. There is a guard on duty at this TAC, but no airport type security. No one in the TAC was reading the signs. Capehart learned most people who visit this TAC are repeat customers. They have two assistors, and one works part time. There is no television in this TAC and there really is not room for one. The assistors sit side by side, separated only by a wall. In order to have the TAC close on time, the assistors would like to have a sign stating if the client isn't in line by 4:15 p.m., then they will need to come back the next day to receive service.



New York City, NY

Capehart stated this TAC office is in a mid-rise building and there is airport like security to enter the building. The TAC is located on the 7th floor and a folding table outside the TAC had various literature on it. The first room you go in has shelves with publications and forms for self service. The TAC office is down a hallway and through another set of double doors. You wait in line until you are served. No one in line was reading the signs. The TAC had a seating area for about 150 people. Capehart noted the receptionist was very helpful and he had the opportunity to provide an outreach about TAP to the receptionist and the guard. The signs are the same signs we've seen everywhere, such as no food and no cell phone use. One cannot see the signs while waiting in line, only when sitting down in the waiting room. The manager commented the clients do not read the signs and was not enthusiastic about the idea of a talking poster. There is no television at this TAC, but one will be available in the near future. The thought of having IRS messages embedded in the program when commercials come on would be good. This particular TAC was downtown, but there is one in Harlem and one in Manhattan.

Lafayette, IN

Dave Monnier and Capehart visited this TAC together. You enter the TAC from the back of the building but signs in the front are clear and direct you to the back of the building. Monnier provided his observation and stated it was difficult to schedule a time to meet with the manager, as the manager is only there once a week. They had a chance to speak to the lead employee who said they are basically happy with the signs they have. The Q-Matic "now serving" sign was not working at the time. The sign stating "take no more than five copies" in the self service forms area was falling down.

- **Identify common observations and concerns (Thompson)**

It is apparent the signs are not being read and this committee needs to be creative on how to catch the attention of the taxpayers. Most taxpayers don't care to read the signs as they are visiting the TAC to accomplish something else and are not interested in reading the signs.

Tommy Thompson inquired about homemade signs. One comment made was the only homemade sign read was one stating no public facilities were available.

Per Capehart the sign he observed the most was the "Catch a Break" sign. Audrey Child-Tomie agreed, and added about half the signs displayed are the no food or cell phone use signs. Capehart commented these are rules you need to know prior to your visit.

Thompson asked for comments about signs in another language. Child-Tomie indicated during her visit she spoke with a customer, and with the little English he knew and the little Spanish she knew, noted he didn't understand the sign in Spanish. Perhaps it is a literacy issue and we need to keep in mind customers who cannot read. Roy Block added the high school drop out rate is about 25%, so it is very possible these customers cannot read.

Thompson advised the manager of a TAC he visited noted taxpayers who do not speak English generally have an interpreter with them even though the TACs do offer interpreters over the phone. Bob Fett stated when he was a TAC manager they used the interpreter phone line at least once a month. Customers do bring translators with them, but the line was a useful tool.

Leggett stated the TAC he visited used Spanish the most of all the languages offered.

Ellen Smiley noted taxpayers may bring in their own interpreters because it's a trust issue.

Smiley commented on Capehart's report on the Poughkeepsie TAC requesting a sign asking customers to come back if they are not in line by 4:15 p.m. The Chicago TAC has such a sign and wondered if smaller TACs weren't allowed to use this type of sign.

Next Steps (Thompson)

- **Observation review for May**



- **Patricia Davis**
- **Louise McAulay**
- **Herb Bohrer**

Program Owner Comments (Toni Horton)

- **Over the Phone (OPI) Statistics**

Toni Horton reviewed the OPI statistics emailed to the committee, which gives the top 25 languages used in 2008. Spanish is used 91% of the time. Horton noted Field Assistance and the IRS have expanded their language services to 175 different languages to help taxpayers meet their responsibilities. Field Assistance hopes to have more face to face accessibilities with taxpayers to help deal with literacy issues.

Bob Fett noted there is brochure which allows a taxpayer to point to the language they speak and also let's the taxpayer know the interpreter service is free.

Child-Tomie inquired if these interpreter services have the conversations recorded to be able to go back and listen to the conversation for clarity.

Horton advised she will find out and let the committee know.

Office Updates

The Milwaukee office has been preparing for their Area 4 face-to-face meeting which took place last week in Chicago. Last year the TAC Committee was looking at the payment process in general and for truck drivers. Mary Jo Werner gave the TAC report to her local congressman who was interested in the Form 8109B, FTD Deposit Form process for all taxpayers. He recommended a proposal, which has been approved and is working its way through the senate.

The recruitment process ends this week and ranking the applications will take place the week of May 11, 2010. Thompson suggested to the panel members to embrace the opportunity to volunteer to interview these applicants when it comes to this step in the recruitment process.

Meeting Adjourned

Next Teleconference is Tuesday, May 25, 2010 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, March 23, 2010**

Program Owners

- Beth Braddock - Program Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Capehart, Craig - Dallas, TX - Member
- Davis, Patricia - Mitchellville, MD - Member
- Eik, Nancy - Missoula, MT - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- O'Neill, Patricia - San Jose, CA - Member
- Spiotto, Ann - Lincolnwood, IL - Member
- Thompson, Tommy - Southaven, MS - Chair

Committee Members Absent

- Child-Tomie, Audrey - Brick, NJ - Member
- Conder, Dean - Lakewood, CO - Vice Chair

TAP Staff

- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Robb, Patti - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Program Analyst

Welcome/Announcements/Review Agenda (Tommy Thompson)

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes Approved

TAC Visits

- **Observation Review**
 - **Dallas**

This is Craig Capehart's second visit to the Dallas Taxpayer Assistance Center (TAC). He noted the signs posted range from hand made to professionally done. Not all signs are visible in the waiting room, but did notice the Center for Disease Control and the Catch a Break poster. The manager did like some of the signs, but did not like the idea of having pamphlets. The manager also noted the cell phone use is more of a concern when the customers are talking on the phone, not when texting. She was in favor of having information displayed on a television.

- **Farmers Branch**

Capehart noted this TAC is in a suburb of Dallas. You go through airport like security when entering the building where the TAC is located. The hours of operation for the TAC are stenciled on the front doors of the TAC Office. The TAC looks nice on the outside but once inside you get a feeling of disorganization where the signs are concerned.

Capehart observed there was tape on the floor which served as direction to the taxpayer they should not cross the line of tape. He witnessed a taxpayer crossing the line and heard the clerk telling the



taxpayer to get back behind the line until called. There were many signs stating “wait behind the line” and “stop here”. There was one sign in Spanish which read the TAC was closed for lunch, but the office didn’t actually close for lunch. This was brought up to the manager’s attention and he responded the sign will be removed. He liked the idea of having an informational video but not keen on having pamphlets.

Patricia Davis inquired about making appointments in the TACs. A brief discussion took place regarding this subject between Davis, Capehart, and Beth Braddock.

The meeting discussion continued regarding signage and communication. Capehart mentioned when a customer goes into a bank their signs are professionally displayed either in stands or display frames. The displays are expensive, but look very nice.

Braddock mentioned the manager in each TAC office should be looking at the display of signs in their TAC annually.

- **Chicago**

Ann Spiotto, along with Ellen Smiley and Lisa Gabriel, visited the Chicago TAC. The TAC is in an office building and airport like security is required to enter the building.

The TAC looked busy with about 40 to 50 taxpayers waiting in chairs. The manager was very organized. She was helpful and forthcoming with information.

After a discussion with the manager we walked through the TAC, which looked professional, and looked at the signs. We were the only ones reading the signs. The manager commented no one seems to read the signs, and suggested if we really wanted to communicate, then information needs to be displayed on a television screen or an electronic display board. The manager did say the “no cell phone” and “no eating” signs are helpful. Also, the sign they post around 3:00 pm when there is a waiting room full of people, which advises no additional customers will be served that day. The sign basically notifies the customer the TAC is open; however they may not receive service before the close of business today due to the large number of people waiting.

The manager did express concern about the privacy of taxpayers if cell phones were used to take pictures. We enquired about the idea of a talking poster and the manager indicated she did not find it to be a good idea as children waiting with an adult would constantly activate the poster, which could be annoying to others waiting in the TAC.

Most of the clientele are English or Spanish speaking. The manager noted having a booklet of all signs instead of them being posted would reduce clutter. She felt the signs in her TAC did not get read. Taxpayers watch the television more than showing an interest in reading the signs.

Davis asked if there were posters in Spanish as well as English. Spiotto stated there were some posters in Spanish but, did not recall which ones they were.

Davis also asked if a video would be done would it be done in English only or would other languages be considered?

Herb Bohrer noted when he visited the Boise TAC there were signs for interpreter services and asked the manager how often this service was used. Bohrer feels it would be worth knowing what kind of interpreter service is used and how often.

ACTION ITEM: Braddock is going to attempt to find information regarding how often interpreter services have been used in each TAC and what type of interpreter service.

Smiley reminded everyone in January Braddock provided information on the interpreter service and how it provides services for over 170 languages.

- **Schiller Park**



Spiotto noted this TAC is smaller than the Chicago TAC. There is no airport like security, but there was a security guard. The TAC was occupied by six to eight taxpayers and signs were well displayed but no one was reading them. Even the manager noted she never sees anyone reading the signs. There wasn't a television at this TAC, therefore no ability for an informational video. The manager stated although the signs don't seem to add anything, their display isn't negative either. She felt cell phone usage is a problem and therefore the no cell phone sign is important and suggested making it more eye catching. It was also suggested putting signs/information on the internet for people to see prior coming to the TAC.

- **Identify common observations and concerns (Thompson)**

Tommy Thompson inquired if all TACs should be using mandatory signs, and Braddock noted all TACs should be using the mandated signs as those are created professionally. Braddock added all signs are suppose to be approved by management and not all signs come from one central location.

It was suggested when a taxpayer calls the IRS toll free number, have sign like information provided instead of music.

Nancy Eik was having trouble getting an appointment with the TAC in her area. Braddock indicated she will assist Eik.

Next Steps (Thompson)

- **Observation review for April and May**

Make sure when you schedule your visit you provide the date to Ellen Smiley as well as your review / observation when you have completed your visit.

Office Updates

The Milwaukee office will have a new secretary, Annie Haywood, as of Monday, March 29, 2010.

Meeting Adjourned

Next Teleconference is Tuesday, April 27, 2010 at 1:00 pm CST



**Taxpayer Assistance Centers (TAC) Committee
Teleconference Meeting Minutes
Tuesday, February 23, 2010**

Program Owners

- Beth Braddock - Program Analyst

Committee Members Present

- Bohrer, Herbert - Springfield, ID - Member
- Capehart, Craig - Dallas, TX - Member
- Child-Tomie, Audrey - Brick, NJ - Member
- Conder, Dean - Lakewood, CO - Member
- Davis, Patricia - Mitchellville, MD - Member
- Eik, Nancy - Missoula, MT - Member
- Fretheim, Daniel - Decorah, IA - Member
- Leggett, John - Canterbury, NH - Member
- McAulay, Louise - Florence, SC - Member
- Monnier, David - Indianapolis, IN - Member
- O'Neill, Patricia - San Jose, CA - Member
- Spiotto, Ann - Lincolnwood, IL - Member
- Thompson, Tommy - Southaven, MS - Member

TAP Staff

- Block, Roy - Milwaukee, WI - Manager
- Smiley, Ellen - Milwaukee, WI - Program Analyst
- Robb, Patti - Milwaukee, WI - Program Analyst
- Gabriel, Lisa - Milwaukee, WI - Secretary

Welcome/Announcements/Review Agenda (Tommy Thompson)

Roll Call (Lisa Gabriel)

Quorum met

Approval of Minutes (Tommy Thompson)

Minutes approved

Tommy Thompson verified with Beth Braddock the larger Taxpayer Assistant Centers (TAC) have the ability to show a video. However they are not attached to a computer. Monitors are hooked up to a DVD player or to cable.

Patricia Davis stated she was unable to find the electronic signs that were emailed.

ACTION ITEM: Smiley will resend the files to Davis.

Thompson noted some of the documents sent via email have been going to his spam folder. Davis and McAulay both expressed having trouble opening some of the documents which are sent.

TAC Visits

- **Observation Review (Monnier/Capehart)**
- **Identify common observations and concerns (Thompson)**

Dave Monnier advised he and Craig Capehart went to visit the Fort Wayne, Indiana TAC. Monnier stated everyone should have had the chance to read the report of the TAC visit and asked if there were any questions. Some of the highlights of the report were brought up by the panel members. Specifically, there were no signs directing you to the TAC. For future observations, view signage on the exterior of the facility as well as inside the TAC. Monnier noted sometimes signs are painted on



parking lot pavement and at the Fort Wayne TAC, it would be good to have a sign painted on the pavement saying IRS is in the back. There isn't even a sign on the door indicating this is the TAC. Capehart added unless you have been to this TAC before it was not easy to locate. Thompson noted that on page two of the report the TAC Manager stated the fewer the signs the better, and fewer words on the signs. John Leggett brought up the fact we are saturated with signs in the employment world and no one reads them as there are too many. Thompson also noted it is too late to have the sign posted in the TAC which reads "exact change required", as the taxpayer is already there with their money and not necessarily with exact change. A good observation brought up by Capehart was all signs are bilingual except the Q-Matic. Further discussion took place about the operation of the Fort Wayne office outside of the direct signage observations. Dean Conder noted that our project includes communication overall and not just signage.

Capehart and Monnier both visited the Indianapolis, Indiana TAC as well as the Fort Wayne TAC. Capehart explained this TAC is a secured federal building and everyone goes through a security checkpoint process. The only way to gain entrance is to have valid photo identification. If you don't have an ID, then you don't get access. Capehart stated the office sign identifying the TAC was very professional looking. The other mandated posters are posted on two different walls, and unfortunately the way the waiting area is set up, those signs are behind the taxpayers. The Manager noted they don't get questions about the signs. The Indianapolis TAC is a very professional looking office but some of the posters look cheap and out of character with the rest of the building. Capehart stated he thinks the gun and knife sign is worthless since you go through security to get into the building. He also stated that since the visit took place shortly before Valentine's Day the office was nicely decorated for the occasion.

ACTION ITEM: Panel Members please send your completed TAC Visit Reports to Smiley, who will ensure they are provided to the committee as pre-reads.

Next Steps (Thompson)

- **Observation review for March and April**

If you have not made your TAC Visit appointment yet, please schedule it and let Smiley know the appointment date.

Video Ideas (Thompson)

- **Script 1 original video**
- **Script 2 short follow up video**

We will be working on the scripts and modifying them as needed to provide the best communication to taxpayers who come to the TACs in order to relay the information they need to know.

Talking Poster/ Poster Ideas

- **Ideas**

A discussion took place about the article on BBC News regarding talking posters which was sent with pre-reads for the meeting. The article is about a video screen attached to a computer and instead of seeing a solid poster; you see a poster that talks to you. We may want to look at talking posters for the TACs. Louise McAulay noted a talking poster may be good for those with literacy issues. Davis stated this is a good way to also reach the young taxpayers. Thompson feels a talking poster would be good as they could have someone doing sign language for those taxpayers who are hearing impaired. Herb Bohrer inquired if this is an opportunity for us to work with the Communications Committee and find out what message(s) IRS needs to be communicating. Block noted this isn't really the scope or purpose of the TAP Communication Committee. Thompson said our purpose is to suggest what to do with the signage, and also work with the communication methods in the TACs. Braddock is trying to find out the budget and how much of the printing budget is for signs. This discussion will continue for next month and Smiley will include it on the agenda.

Program Owner Comments (Beth Braddock)

Braddock noted the information on the posters is the same information provided on the IRS website, however not everyone will look at the site and not everyone has access to a computer. If a taxpayer is



not able to get into a TAC office, they can call the 1040 toll free line to get an answer.

Office Updates (Roy Block)

Smiley had emailed information about a pilot program in larger TACs allowing taxpayers to schedule appointments for tax preparation online. This is a result of the 2008 TAC Committee Report.

The Milwaukee office will be interviewing for a new secretary soon.

We are also trying to draw conclusion about last years report to get truckers to electronically file Form 2290, Heavy Highway Vehicle Use Tax Return. There are ten websites that allow e-filing of Form 2290 and one of the pre-reads was a draft poster addressing this fact.

Meeting Adjourned

Next Teleconference is Tuesday, March 23, 2010 at 1:00 pm CST