



2008 Meeting Minutes Volunteer Income Tax Assistance (VITA) Issue Committee

- December 4, 2008
- November 12, 2008
- October 14, 2008
- September 9, 2008
- August 12, 2008
- July 8, 2008
- June 13-14, 2008
- May 13, 2008
- April 8, 2008
- March 11, 2008
- February 12, 2008

**VITA ISSUE COMMITTEE Meeting
Arlington, VA
December 4, 2008
8:00 AM EDT**

Program Owner

- McElligott, Fred

Designated Federal Official

- Collins, Shawn

Committee Members Present

- Axelrod, Justin
- Blandchard, Greg
- Buschmann, Ray
- Criel, Laura
- Deller, George
- Florence, Jaspconia
- Gambardella, Linda
- Hutchinson, Carolyn
- Johnson, Edwards
- Kim, John
- Rousseau, Rick
- Shillow, Moses
- Verwiel, John
- Wernz, Stan



Committee Members Absent

- Bryant, Patricia

TAP Staff

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

Other Attendees

- Barnett, Carol
- Burton, Roger
- Mosler, Hank (former Committee member)

Welcome

Rousseau welcomed everyone and asked all attendees to introduce themselves.

Mission of VITA Issue Committee, Roles and Expectations

Rousseau discussed the mission of the VITA Program, the protocol during VITA Committee meetings (face-to-face or teleconferences), the roles of the TAP staff and the roles of the IRS Program Owners as well as those of the Committee and subcommittee chairs.

He informed all attendees of the importance of participation, not only in the monthly Committee meetings but in the subcommittees' as well. He requested that members inform Analyst Knispel or the Committee chair when they will be absent from a Committee meeting. The participation of the subcommittee chairs, mainly in their subcommittee meetings, is crucial since it is in the subcommittees where the work gets done. It is also important to take notes at the subcommittee meetings in order to follow up with the issues and in order to report the subcommittee's work at the monthly Committee meeting. Also, the members agreed on the number needed to establish quorum: half the number of members plus one.

Face-to-Face Meeting

Rousseau informed the members that besides their monthly Committee teleconferences they are expected to attend a face-to-face (FTF) meeting. The VITA Issue Committee has held its meeting in Atlanta in the last few years as most of the Program personnel is located in that city. Last year, we had a two-day meeting and members should expect the same this year.

Mosler added that some members may have to travel at other times during the year in order to participate in some of the Program's projects.

Flow of issues:

Rousseau explained that in Issue Committees the issues flow from the IRS Program Owner to the Committee, while in Area Committees it is the opposite process.

Rousseau added that members who come with their personal agendas may lose focus of the issues assigned by the Program Owners. These personal issues may get rejected in the Issue Committees by the Program Owners and should be brought up at the Area Committee meetings as these committees aim to bring in grass root issues.



Rousseau introduced Director of Product and Partner Development Carol Barnett. Barnett expressed her appreciation for all the work this Committee has done in the past year. She explained some of the new initiatives in the VITA Program and expressed the importance of the TAP members' involvement in the development of the VITA Program materials.

Review of 2007 and 2008 Recommendations

Rousseau asked the members to review all these recommendations (handout provided) at their own leisure. He did review each of the 2008 recommendations at the meeting and indicated that these had recently been elevated. He also said that the members were not satisfied with the responses received from the Program Owners for those of last year and so, member Elizabeth Colvin worked with the IRS this year (2008) to get a more comprehensive and thorough response to the 2007 recommendations.

2009 Issue Focus and Goals

McElligott thanked the returning members for the work they did last year and welcomed the new Committee members. He explained the three new issues that this Committee will be with involved in 2009 (a handout describing these issues was provided to the members prior to the meeting). The issues are: Training VITA Volunteers, Measuring VITA and TCE Return Accuracy and Quantitative Measure for SPEC's Assistance to Partners.

Election Process

Chair: Laura Criel
Vice Chair: John Kim

Committee Structure

Teleconferences: 2nd Tuesday of each month at 2 PM E.T.
Face-to-face meeting dates: May 7 and 8, 2008
Location: Atlanta, GA

Subcommittees:

Training VITA Volunteers – Hutchinson (chair), Johnson, Florence, Gambardella - This Subcommittee will meet on the third Friday of each month at 1:00 PM ET.

Quantitative Measures – Shillow (chair), Deller (vice-chair), Johnson, Axelrod, Wernz - This Subcommittee will meet on the second Tuesday of each month at 11:00 AM ET

Measuring VITA and TCE Return Accuracy – Blanchard (chair), Buschmann (vice-chair), Kim, Verwiell - This Subcommittee will meet on the second Tuesday of each month at 1:00 PM ET

Closing

Criel thanked all the members for their participation.



**VITA Committee Meeting Minutes
November 12, 2008
2:00 PM
Teleconference**

Program Owner

- McElligott, Fred
- Burton, Roger

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Buschmann, Raymond
- Colvin, Elizabeth
- Coonradt, Richard
- Criel, Laura
- Davidson, Charles
- Florence, Jasponia
- Hutchinson, Carolyn
- Mosler, Hank
- Rousseau, Richard, Chair
- Taylor, Rita

Quorum Met

Committee Members Absent

- Bland, Sandra
- Bryant, Patricia
- Jackson, Robert

TAP Staff

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

Other Attendees including the Public

None

Welcome

Marisa welcomed everyone and introduced the new TAP secretary of the Brooklyn office.



Review Agenda

Rousseau also welcomed everyone and mentioned that this is the last meeting for 2008 except for the Annual Meeting that starts the TAP 2009. We will see those TAP returning members in Arlington, VA.

Rousseau continued by asking the members' consensus on the six pending proposals. Pending a minor change to the last one, all members agreed to forward them to the IRS (our Program Owner) as presented.

These proposals are:

- Mileage Reimbursement for VITA Volunteers
- Adding Schedule K-1 to the Scope of VITA
- Advertising VITA
- Recognition of VITA Volunteers
- Year Round Service

Program Owner's Presentation

McElligot spoke about the responses they had provided to our Committee on the recommendations made in 2007. Rousseau was very appreciative for these thorough responses to each of the recommendations and Mosler suggested the staff add these responses to the Database for future recordkeeping and tracking of issues.

Rousseau suggested that the recommendations made by the VITA Issue Committee in 2007 and 2008 be shared with the new committee members in December.

Annual Meeting

The draft agenda for the Annual Meeting was reviewed. They all agreed it is a good agenda.

Coonradt asked a question about Link-n-Learn and this ensued discussion on this topic.

Farewell

Rousseau acknowledged the great input and assistance received from the members who are leaving the TAP this year and thanked everyone. Knispel did as well.

Mosler and Rousseau initiated the discussion of having TAP alumni as sources of knowledge, experience and information even if limited to participating in Issue Committee only. Knispel asked those members who will not be returning to the TAP after this year that they should continue their interest in the organization and their involvement by submitting their ideas and input.

Mosler, 2008 TAP Chair and a member of this Issue Committee, expressed his appreciation to both members and staff, for the work and the comradeship in this Committee.



**VITA Committee Meeting Minutes
October 14, 2008
2:00 P.M. ET
Teleconference**

Program Owner

- McElligott, Frederick

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bryant, Patricia
- Coonradt, Richard
- Davidson, Charles
- Criel, Laura
- Hutchinson, Carolyn
- Mosler, Henery
- Rousseau, Richard
- Taylor, Rita
- Yandow, Robert

Committee Members Absent

- Bland, Sandra
- Buschmann, Raymond
- Colvin, A. Elizabeth
- Florence, Jasponica
- Jackson, Robert

TAP Staff

- Odom, Meredith

Other Attendees

- Burton, Roger

Welcome

Rousseau welcomed everyone to the call.

Roll Call

Quorum Met

Review Agenda



Joint Committee Update

Rousseau informed the members that the Joint Committee discussed making the Annual Meeting more of a working meeting for Area and Issue Committees. Members are encouraged to run for Chair/Vice Chair of the VITA Committee. Chair/Vice Chair training will be held on Friday following the Annual Meeting. If you plan on running for Chair, please plan on staying an extra day to attend this meeting. Rousseau will work with staff to have the Annual Meeting Agenda complete for the meeting. Rousseau will chair the meeting until the new Chair is elected.

Mosler feels TAP will be more productive if the Vice Chairs are actively engaged as well as the Chairs.

Program Owner Presentation

Burton informed the members that McElligott will be the new Program Owner for the VITA Committee. McElligott is the Area 1 Director in SPEC.

McElligott addressed the committee and informed them that he is excited about working with the committee.

Morizio encouraged members to run for Chair and Vice Chair since both the current Chair and Vice Chair will be retiring.

Subcommittee Report-Out Taxpayer Assistance Blueprint (TAB) – Collaboration Strategy

This subcommittee will meet on Thursday October 16, 2008 to discuss their proposals. All members are encouraged to join this call to discuss this subcommittee's proposals. Being that the meeting is not on the Federal Register, the committee will send all suggestions to Knispel via email. The proposals are listed below:

1. Statement of Issue: Incentives should be provided to volunteers who participate in the VITA/TCE Program in order to gain greater collaboration and reward their time and efforts.

Proposed Solution is the Internal Revenue Service should take a leadership role in establishing consistent nationwide recognition to its VITA volunteers, whether its volunteers with VITA, TCE, or others. It should make a firm commitment to involve its personnel in all recognition ceremonies.

2. Statement of Issue: Encourage skilled and knowledgeable volunteers to provide free tax assistance to targeted taxpayer populations (e.g., low income, elderly, disabled).

Proposed Solution is one major out-of-pocket expense that needs to be incurred by the volunteer tax counselor is the cost of getting to and from the tax preparation site. To encourage rather than discourage the volunteer and the valuable contribution he/she provides in enhancing tax compliance, these volunteers should be offered the opportunity for reimbursement of these necessary and reasonable travel costs.

3. Statement of Issue: Recommend VITA Partner Organizations provide year round service to taxpayers.

Proposed solution is a national 800 phone number could be established where taxpayers could call with problems, questions and concerns about their tax problems and volunteers could pick up the calls and answer them all year long.



Taxpayer Assistance Blueprint (TAB) – Broader Offering of Services

Criel reviewed all proposals:

1. Statement of Issue: Many people who meet the definition of a person eligible for VITA assistance have income from trusts or Subchapter S corporations and for this reason only must seek the assistance of a paid preparer.

The Proposed Solution is to add certain information from Form 1041 Schedule K-1 and Form 1120S K-1 to the VITA curriculum and include them in the scope of VITA returns. The types of income added would be limited to interest, dividends, and capital gains. These income entries would be made directly to schedules already within the scope of VITA, ie. Schedule B and Schedule D.

Mosler suggests adding a sentence stating if the proposal is accepted the VITA Training Program needs to incorporate the training on which components on K-1 are included and how to complete them. Criel will make the change and send to the group for consensus. When the minor changes are made, the committee will forward the proposal to the JC.

2. Statement of Issue: Many people who are eligible for free tax assistance are not aware of VITA programs.

Proposed Solution is to have the IRS include VITA information with any correspondence about EITC. Also, include a message on the phone during the "wait period" when a taxpayer has contacted the IRS by phone.

Mosler suggest adding an additional line incorporating into the EITC Day promotions. The vision is to have the VITA flyer ready to be handed out on EITC Day. When minor changes are made, this proposal will go forward to the JC.

3. Statement of Issue: The VITA program can be expanded by allowing the preparation of schedules and forms outside the scope of VITA if these returns are prepared by people who are trained and have experience in the preparation of such forms.

Proposed Solution is to allow a coordinator at a VITA site to determine the level of expertise of a preparer who might be available to prepare a tax form or schedule that is beyond the scope of the VITA program. The coordinator would keep a record of the preparer's credentials or education that indicates that person's ability to prepare the return in question. The coordinator would also be responsible to meet the requirements of IRS for quality review of the return by a person who is competent to complete the review.

McElligott suggests this issue should be carefully considered because you need to know if the person has the true skill set to prepare the returns and what will it mean in terms of the full scope of checks and balances. The committee will revisit this issue at the next meeting.

4. Statement of Issue: Many people eligible for VITA assistance have income that is required to be shown on a Form 1040, Schedule C. The VITA program does not currently include the preparation of Schedules C.

Proposed Solution is to add certain Schedules C to the list of returns eligible to be prepared at VITA sites. These schedules would be limited to those meeting the requirements and limitations of Schedule CEZ, with the limitation waived for the amount of expenses that must be shown on a Schedule C.

2007 VITA Recommendations

These will be discussed during the November teleconference.

Public Participation

None



Closing



**VITA Committee Meeting Minutes
September 9, 2008
Teleconference**

Program Owner

- Fairley, Vickie
- McElligott, Fred

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bland, Sandra
- Bryant, Patricia
- Buschmann, Raymond
- Colvin, Elizabeth
- Coonradt, Richard
- Criel, Laura
- Mosler, Hank
- Rousseau, Richard
- Taylor, Rita
- Yandow, Robert

Committee Members Absent

- Davidson, Charles
- Florence, Jasponica
- Hutchinson, Carolyn
- Jackson, Robert
- Ling, Julia

TAP Staff

- Knispel, Marisa
- Odom, Meredith

Other Attendees

- Burton, Roger
- Craig, Jim

Welcome

Rousseau welcomed everyone.

Roll Call

Quorum Met



Review Agenda

Reviewed

Program Owner Presentation

Fairley apologized to the members for her absence at the last teleconference. She indicated that Roger Burton will continue to support the Committee and also introduced Fred McElligott as the new and permanent Program Owner for the VITA Issue Committee. McElligott is relocating from Denver to Atlanta where the SPEC's Area 1 Office will now reside.

Subcommittee Report-Out

Rousseau would like the Subcommittees to complete their work on the various issues by the end of this month so that they can be discussed and approved/rejected by the full Committee in their October meeting. Afterwards, they will be forwarded to the IRS. He recommended the Subcommittees consider meeting twice this month to finalize their issues. He asked that the Subcommittees review their charge and what is expected of them in the documents provided by the Program at the beginning of the year.

Training VITA Volunteers Subcommittee

Bryant informed the members that the VITA Testing was completed in June when the group met in Atlanta. She has recently reviewed Publication 4189, VITA's Test/Retest Answers and Colvin reviewed the Site Coordinator's Handbook. SPEC's Nan Ellen Fuller suggested the Subcommittee review the law-portion of the Publication 4012, Volunteer Resource Guide. They have completed this task and the suggested changes were forwarded to Fuller.

Rousseau asked Bryant to provide a report listing the different items that they worked on.

Taxpayer Assistance Blueprint (TAB) – Collaboration Strategy Subcommittee

This Subcommittee did not meet this month. Coonradt informed the members that the last time they met, they made an outline of the different items they were interested in working on but wanted to review the responses to the Survey before making their recommendations.

The next Subcommittee meeting is on 9/11/2008 at 1:00pm ET time.

Taxpayer Assistance Blueprint (TAB) – Broader Offering of Services Subcommittee

Criel informed the members that this Subcommittee is looking at issues related to tax preparation. At their last meeting and, after considering some of the Survey responses, they suggested adding a Schedule K-1 from the Form 1065 and the Form 1120S but only to report interest, ordinary and qualified dividends and/or long or short capital gains. The preparers would need to be notified and training would need to be provided on these forms. The Subcommittee does not recommend adding Schedule C or Schedule E to the list within the VITA scope.

A suggestion from the Survey responses received is that of adding more visibility to the VITA Program. The IRS should increase advertising and it should be easier for people to find out the closest site to them.

The Subcommittee still has some other items to consider such as the preparation of forms such as Form W-7 and Form W-4 at the sites. In reference to adding the Schedule E as one of the forms to be prepared at the sites, they had a long discussion but decided not to include it due to its complexity. This would require additional training and this Schedule is already being prepared at military sites.

Mosler requested that Criel invite Colvin to the next Subcommittee meeting to further discuss preparation of the Schedule C at these sites.



2007 VITA Recommendations and VITA Flyer

Colvin will follow up on the comments that were submitted by the Committee in reference to the flyer.

Public Participation

None

Closing

Rousseau thanked everyone for their hard work and for their participation in today's meeting.



**VITA Issue Committee Meeting Minutes
August 12, 2008
Teleconference**

Program Owner

- Not in attendance

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bryant, Patricia
- Buschman, Raymond
- Colvin, Elizabeth
- Coonradt, Richard
- Criel, Laura
- Davidson, Charles
- Ling, Julia
- Mosler, Hank
- Rousseau, Rick
- Taylor, RIta

Committee Members Absent

- Bland, Sandra
- Florence, Jaspocnia
- Hutchinson, Carolyn
- Jackson, Robert
- Yandow, Robert

TAP Staff

- Knispel, Marisa
- Odom, Meredith

Other Attendees

- Ferree, Nancy

Welcome

Rousseau welcomed everyone to the call.

Roll Call

Quorum Met

Review Agenda

Rousseau reviewed the agenda.



EITC Issue Committee Proposal

Rousseau asked the participants for their comments on the proposal referred to us by the EITC Issue Committee. The proposal was referred to our Program Owner for her consideration and comments. Criel indicated that the proposal is very good but she is having a hard time understanding the language while Davidson feels it is out of our scope. Rousseau indicated that he has no problem in reviewing another committee's proposal but suggested that if the topic of the referred proposal is not within our immediate scope (or an assigned topic), we should not spend much time on it.

Mosler finds this proposal is confusing. Criel volunteered to work on the proposal's topic if the Program Owner deems it to be appropriate for our Committee.

VITA Survey

Rousseau asked that each of our members remind their respective Area Committee colleagues to complete the VITA surveys. Rousseau suggested inviting former TAP members to complete the Survey, too. Knispel will share it with former members.

The purpose of the Survey is to collect suggestions for our subcommittees which will formulate proposals on these suggestions.

Subcommittee Report-Out

Rousseau asked Subcommittee chairs to send a reminder of their meetings in advance.

Taxpayer Assistance Blueprint (TAB) – Collaboration Strategy

This subcommittee is awaiting the Survey's responses to continue their work.

Taxpayer Assistance Blueprint (TAB) – Broader Offering of Services

Criel discussed the Subcommittee's EXIT Survey that was distributed with the Agenda. This Survey will be given to people visiting VITA Sites and the responses to the Survey will help the VITA counselor (preparer) identify and counsel them on potential life changes that could affect their next year's tax return.

Knispel asked Criel to write a cover letter to send to the Program Owner with the proposal.

2007 VITA Recommendations

Colvin indicated that Nan Ellen Fuller requested an extension until the end of the August to respond to the Committee's 2007 recommendations. She added that Fuller had sent her a copy of a flyer that will be used to publicize VITA. Knispel will share this flyer with everyone and asked that comments and recommendations on it be sent to Colvin and to her. This is an opportunity for the Committee to provide input on the design and content of the publicity flyer.

Knispel informed members that Bryant and Hutchinson will participate in the Tax Wise Beta Testing on October 21, 2008 in Rome, GA. Rousseau asked these two members to report on the Project so that we can account for the Committee's participation in the Committee's Annual Report.

Mosler informed members that he met with new Commissioner Schulman and NTA Olson when he discussed the publicizing of the VITA and Free File Programs. He indicated to them that many low and moderate income taxpayers are using paid preparers because they are not aware of these free opportunities. The Commissioner seemed interested and urged our Committee to continue to work on this issue.

Public Participation

n/a



Closing

Rousseau thanked all participants.



**VITA Issue Committee Meeting Minutes
July 8, 2008
Teleconference**

Program Owner

- Failey, Vickie (Acting Program Owner)

Designated Federal Official

- Knispel, Marisa

Committee Members Present

- Bland, Sandra
- Colvin, Elizabeth
- Coonradt, Richard
- Criel, Laura
- Davidson, Charles
- Hutchinson, Carolyn
- Jackson, Robert
- Mosler, Hank
- Rousseau, Richard - Chair
- Taylor, RIta
- Yandow, Robert

Committee Members Absent

- Bryant, Patricia
- Buschmann, Raymond
- Florence, Jaspconia
- Ling, Julia

TAP Staff

- Odom, Meredith

Other Attendees

- Burton, Roger
- Hollingsworth, Elizabeth

Roll Call

Quorum Met

Welcome

Rousseau welcomed all participants and provided some information from the recent Joint Committee meeting such as the decision to have the 2008 TAP Annual Report completed sooner than last year's. The 2007 Annual Report is still not finalized. He requested that the three VITA subcommittees provide their recommendations to the IRS by October.



Rousseau reminded the members that this year's Annual Meeting will start on Tuesday, December 2nd and continue through Thursday, December 4th; Monday and Friday will be travel days except for those members who are elected committee chairs who will stay to attend the Chair Training on that Friday. All Area and Issue Committee chairs will attend the meeting to pass down their position to the incoming chairs. This year's meeting will be a "working meeting" and will provide more meeting time for the Area Committees while the Issue Committees will meet only for half-a-day.

Rousseau also indicated that following NTA Nina Olson's request, a new Issue Committee will be formed led by Area 5's chair Ken Wright on the issue of Cancellation of Indebtedness.

Another decision made at the Joint Committee meeting was to use the TAP's former members as a resource on future TAP input and projects.

Lastly, Rousseau informed the members that Cindy Jones from SPEC has invited the VITA members to participate in the BETA Testing on October 21st in Rome, GA. Knispel is awaiting approval of funds for travel and expenses for the Committee members to participate in this project.

Program Owner

Vickie Fairley, who is acting as our Committee's Program Manager in Peggy Gavaghan's absence, introduced herself briefly and indicated that she might have already met some of our members in Cincinnati during the Process Based Training (PBT) testing last year.

SPEC's Plans

No one had questions for the Program Owner on SPEC's future plans to use the TAP's recommendations in their development of the TAB's (Taxpayer Assistance Blueprint) Phase 2. See attached document.

Subcommittee Report-Out:

TAB – Collaboration Strategy

Davidson briefly reviewed this Subcommittee's decisions made at their meeting in Atlanta. He indicated that he would be sharing the survey he created with the rest of the subcommittee members by July 11th for their review and input and thereafter he will also share it with the other Subcommittee in order to consolidate it with their own survey. The consolidated product will be distributed throughout the TAP for input and feedback.

Next Subcommittee meeting is Wednesday, July 16th at 1:00pm ET.

TAB – Broader Offering of Services

Criel reported that they are waiting for the Collaboration's survey to finalize their work. In the meantime, they are creating an Exit Checklist to be used at VITA sites.

Next Meeting July 11th 12:00 Noon ET

Training VITA Volunteers

Criel discussed the Tax Wise BETA testing in which she participated last year.

2007 Recommendations

Colvin informed the members that she has been working with SPEC's Cynthia McKinney on the recommendations the VITA Issue Committee made to the IRS in 2007. McKinney has actively been working with her staff on these recommendations and updating Colvin on their progress. Colvin said she's very grateful for the SPEC's staff collaboration with the TAP. She also indicated that SPEC is



interested in their recommendation of adding a line to the Social Security Worksheet to capture Medicare Part D which can then be combined with Part B and deducted on the Schedule A.

Colvin also indicated that the SPEC staff will provide a written response to the VITA Committee on these recommendations by July 31st and have also offered to have a follow-up teleconference to discuss their response to our Committee.

Public Participation

None

Closing

Rousseau thanked everyone for all their hard work.

Attachment

SPEC's Plans



VITA Issue Committee Meeting Minutes
Friday, June 13 - 14, 2008
Atlanta, GA
Face to Face Meeting

Program Owner

Julieta Garcia, Director of SPEC (Stakeholders Partnerships Education & Communication) for Peggy Gavaghan (absent)

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bland, Sandra
- Bryant, Patricia
- Colvin, A. Elizabeth - Vice Chair
- Coonradt, Richard
- Criel, Laura
- Davidson, Charles
- Florence, Jaspconia
- Hutchinson, Carolyn
- Ling, Julia
- Mosler, Henry
- Rousseau, Richard - Chair
- Yandow, Robert

Committee Members Absent

- Buschman, Raymond
- Jackson, Robert
- Taylor, Rita
- Welch, Peter

TAP Staff

- Knispel, Marisa
- Odom, Meredith

Other Attendees

- Barhhart, Maria
- Barnett, Carol
- Burton, Roger
- Dill, Donald
- Harvey, Catherine
- Hollingsworth, Elizabeth
- Lloyd, Darrell
- McKinney, Cynthia
- Sylve, Mia
- Thomas, Beverly



Roll Call

Quorum met

Friday, June 13, 2008

Welcome/Review of Agenda

Rousseau spoke about the role of the Subcommittee Chair and the importance that all Committee members participate in their subcommittee's work. He requested that the proposals written by each Subcommittee be presented to the full committee by September in order to have the time available to make revisions if needed and to be able to account for all the proposals made this year in the Committee's Annual Report.

National Office Report

TAP Director Bernie Coston welcomed everyone to Atlanta. He spoke about the recruitment season and indicated that this year we received 620 applications for TAP membership with only 35 member openings. Interviews are currently being held and many of our TAP members are also involved in interviewing the candidates. He thanked those in this Committee who are involved in this process. He attributed part of the success in advertising the recruitment with newspapers such as the Wall Street Journal and El Diario (a Spanish newspaper).

Coston indicated that he would like to meet with National Taxpayer Advocate (NTA) Nina Olson the last week of July in order to discuss the preliminary selection of the candidates that were interviewed. The list of the candidates that results from this meeting will then be forwarded to the IRS Commissioner and thereafter to the Secretary of the Treasury for his final decision. The TAP's goal is to notify the new members about their selection by October.

On other topics regarding the TAP: Maryann Motza was offered -and has accepted- a position in the advisory committee for TEGE (Tax Exempt and Government Entities). Motza is also completing her work on the TAP's 2007 Annual Report. Annual Reports- the current TAP chair and vice-chair, Hank Mosler and Wayne Whitehead, are striving to have the 2008 TAP Report completed by the end of January.

Coston also spoke about this year's Annual Meeting which will take place at the Sheraton in Arlington, VA during December 1st through the 5th. At this meeting, the new incoming members will receive an orientation session starting in the afternoon of Monday, December 1st. NTA Olson and the IRS Commissioner plan to attend and speak at this meeting.

Coston also indicated that he is in the process of hiring staff in offices that currently have vacancies. For instance, there will be a new secretary in the Brooklyn office, a new manager in the Milwaukee Office and a new Budget Analyst in Washington, D.C.

Program Owner Presentations:

Overview

Rousseau informed the members that both Mosler and he attended a meeting with TIGTA (Treasury Inspector General for Tax Administration) where they discussed a review performed by the latter of 350 tax returns involving RALs (Refund Anticipation Loans) with refunds of under \$2,000 and fees of about \$190. Of the 350 taxpayers reviewed, 90% were not aware of the VITA Program and other free tax services. TIGTA also reviewed VITA and found that there was 69% accuracy rate with the Program this year. One suggestion they made to Rousseau and Mosler was that VITA volunteers should undergo background checks. Both TAP members disagreed with this suggestion.



Carol Barnett, Director of Products & Partnerships, informed the Committee that next year the IRS Volunteer Agreement with VITA volunteers will include questions related to criminal background but that the IRS would not want to enforce background checks.

Barnett also spoke about the VITA Grant Program which is currently ranking the application and expects to have the selections made by October 15th, 2009. The Program has \$8 million and is a matching-fund program that involves tax preparation but no RALs. The applicants are reviewed by past performance, number of returns prepared and the quality of preparation. The organizations selected would have to have a Sec. 501 © (3) (tax-exempt) designation to receive the grant and be set up for electronic tax preparation. There is no cap for the grant but the funds must be matched. The IRS has marketed this Program extensively around urban and non-urban areas. Currently the VITA Program has 11,800 sites, 76,000volunteers and 250 sites that are open all year. TaxWise software will be provided next year to VITA sites.

Training VITA Volunteers

Kinney spoke about this year's Product Development Project which was formed of several teams to review and revise the various training materials and tests used in the VITA Program. She indicated that the Processed Based Training (PBT) - which is something that this TAP Committee worked on the previous year- is already working successfully. She emphasized the importance of improving the PBT and that of taking the review session that is now provided through Link & Learn.

Kinney introduced Harvey who spoke about SPEC's aim to increase the quality of the educational products and Dill who spoke about this year's Economic Stimulus Payment (ESP).

As mentioned, Harvey spoke about quality. She stated that for the IRS "quality" means "getting to an accurate tax return". She said that for every VITA partner there is a toll for training. In the VITA sites, quality requirements are: 1) intake tool for training, 2) quality review of tax returns, 3) confidence n the training materials and 4) volunteer hotline. The SPEC organization which operates VITA made available a Local Global Training Site Coordinator and a site coordinator corner on the irs.gov that was active from November, 2007 until January, 2008 to use as a support tool for VITA partners. These tools will also be available next year. SPEC is also revising Form 13614, SPEC Intake Sheet, and Form 8158, VITA/TCE Quality Review Sheet, to make them friendlier and easier to use.

Dill spoke about SPEC's efforts in marketing the ESP with emphasis to those who had no filing requirements, who are disabled or who are senior citizens. SPEC marketed the VITA Program to assist mainly those in the first group in filing Form 1040A and take advantage of the ESP. The second phase of SPEC's efforts aims to communicate that it is not too late to file in order to get the ESP. The IRS realizes that those who have not filed their tax return yet are those who cannot file on their own not are able to visit a VITA site to get the assistance needed.

Taxpayer Assistance Blueprint (TAB)

Thomas spoke about the TAB being a five-year roadmap to provide adequate service to the taxpaying public and increase voluntary compliance. SPEC coordinates the quality of the services provided by the IRS and each IRS function/organization that provides services to the public must report back to SPEC. Most specifically, she indicated, they report to an office within the organization that oversees and measures improvement and customer satisfaction. Consequently, Thomas spoke at length about the different measurements used in reaching the goal of the TAB.

She also spoke about the IRS' nationwide outreach strategy which uses the translation of programs and products done by the IRS' Multilingual Office in order to reach English as a Second Language taxpayers.



Link & Learn – Practice Lab

Link & Learn Taxes is an e-learning option for practice, training and certification for VITA/TCE volunteers and SPEC employees. It now has a review session called the Practice Lab. Here are some pointers about the Lab:

The Practice Lab is tax preparation software (TaxWise Online) accessible through Link & Learn Taxes.

Practice Lab will be available in early November and will include 2008 tax year preparation software.

The Practice Lab will enable users to prepare tax returns online for purposes of practice and testing.

The Practice Lab is accessible for Basic, Intermediate, Advance, Military International and Puerto Rico.

The Practice Lab is also accessible from the log in screen for the certification test.

Returns prepared in the Practice Lab can be saved and printed.

2007 Contact History Report & 2007 Recommendations to IRS

Colvin discussed "Branding the VITA Program" for which a TAP subcommittee was formed last year with the objective to develop opportunities to better package and to leverage the strengths of the Program in order to enhance its marketing. An outreach team will look at all VITA products.

Last year's recommendations to the IRS were:

- Increase the visibility and promote the credibility of free tax preparation
- Develop and/or communicate the existence of a poster that may be displayed at each VITA site
- Develop a plan to partner with other government programs
- Integrate VITA information into existing IRS material in a visible way
- Conduct mailings to specific target groups such as Earned Income Tax Credit recipients promoting Vita services
- Develop a program with a goal to enhance the sharing of available promotional products with partners
- Create a bi-fold, business envelope size writ-up/brochure, which could be mailed out or left in public places promoting VITA services
- Solicit neighborhood leaders to promote VITA services
- Identify more rural partners
- Include information about VITA in mailings to clients who call the IRS and request that forms be mailed to them
- Include information about VITA with press releases, e-file messaging and advertising that the IRS currently does
- Update and widely distribute Publication 3676A, "VITA E-Rile Poster."
- Produce camera-ready products that can be placed in various types of media, and should be available for downloading from IRS.GOV
- Create customizable Public Service Announcements (PSA) for local VITA groups to use on television and radio
- Make information about free assistance from VITA more visible and easily accessible on the homepage of IRS.GOV
- Have a message about VITA inserted into the hold music
- Solicit support of National Taxpayer Advocate and Local Taxpayer Advocates to promote/endorse VITA/Tax Counseling for the Elderly during their outreach efforts



Barnett indicated that some of these recommendations have already been implemented but it merits reviewing them.

Subcommittee Break-out

- **Training VITA**
- **TAB – Collaboration Strategy**
- **TAB – Broader Offering of Services**

Subcommittees met

Public Input

None

Closing/Wrap-up

Rousseau ended the meeting for the day

Saturday, June 14, 2008

Opening

Rousseau opened the meeting

Roll Call

Quorum met

Subcommittee Break-Out

Subcommittees met

Subcommittee Report-Out

Training VITA Volunteers Subcommittee

Bryant reported on the work done in different Product Development Teams. She spoke about the Beta test and indicated that it was a good, streamlined product. She also spoke about Publication 4012, Volunteer Resource Guide.

Bryant indicated that at this moment this Subcommittee has no further work to be done but that the members will review the Link&Learn when ready. Meantime, the members of this Subcommittee will join the two remaining subcommittees.

Tab – Broader Offering of Services Subcommittee

This Subcommittee created a Survey that –with TAP Director Coston’s permission- will be addressed to all TAP members in an effort to collect information and knowledge of the members’ experience with VITA. The Subcommittee requests the members’ suggestions on services that should be but are not currently provided at VITA sites such as preparation of forms like Schedule C, Schedule E, etc; advice and tax information; making installments arrangements; supplying tax account transcripts, etc.

TAB – Collaboration Strategy Subcommittee

Davidson indicated that the Subcommittee is interested in finding out what attracts people to volunteer their time and services. They would like to learn what incentives, besides the sense of accomplishment, volunteers seek.



So, the Subcommittee agreed to create a Survey asking these questions and compile them with those of the Broader Offering's survey in order to make it a complete "TAB Survey" and to take the opportunity to survey TAP members on both issues simultaneously.

At the same time, this Subcommittee's members will study already existing models of colleges and high schools that offer tax preparation to their students and to their communities in order to propose to the IRS that these schools' program be implemented by the agency with schools nationwide.

Public Input

None

Closing/Recap Action Items

Rousseau asked members to commit to subcommittee meeting dates and to participate in their meetings.

Knispel will send all the members the Meeting Satisfaction Survey to gain feedback about this meeting.



**VITA Issue Committee Meeting Minutes
May 13, 2008
Teleconference**

Program Owner

- Gavaghan, Peggy

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Colvin, A. Elizabeth
- Coonradt, Richard
- Criel, Laura
- Davidson, Charles
- Rousseau, Richard
- Welch, Peter
- Yandow, Robert

Committee Members Absent

- Bland, Sandra
- Bryant, Patricia
- Buschmann, Raymond
- Florence, Jasponia
- Hutchinson, Carolyn
- Jackson, Robert
- Ling, Julia
- Mosler, Henry
- Taylor, Rita

TAP Staff

- Jenkins, Audrey
- Morizio, Louis
- Odom, Meredith

Other Attendees

- Burton, Roger
- Thomas, Beverly

Welcome

Roll Call

Quorum not met

Review Agenda



Subcommittee Report-Out

- **Training VITA Volunteers**

Criel informed members that the VITA training is about to begin in Atlanta in reference to revisions and rewrites. There will be a TAP representative working on three of the four groups.

Team 1 – Testing

Team 2 – 4491W (formally the 678W workbook)

Team 3 – Publication 3189 and 4012

Team 4 – Site Coordinator Handbook (Publication 1084)

Team 5 – Student and Instructor Material

If you have any information to contribute to these groups, please forward to Criel this week.

- **Taxpayer Assistance Blueprint(TAB) – Collaboration Strategy**

Davidson informed the members that the committee has been having problems with the responses they are getting from the groups they contacted. The committee drafted out a series of questions that would have specific responses from stakeholders. The committee has been using these questions to approach the organizations. The committee hopes to accomplish at the face to face is to have some responses back from the stakeholders to put together a recommendation. Davidson will forward the committee the list of questions that will be asked.

- **Taxpayer Assistance Blueprint(TAB) – Broader Offering of Services**

Criel informed the members that the committee sent out a list of questions that the committee is proposing to the full committee to forward to the entire TAP. The TAP committee may have ideas on broadening the services. The committee is looking to broadening the services at the VITA sites with the idea that the services will enhance the taxpayers' ability to comply with their tax obligation. The committee is looking for ideas and suggestions on broadening the services. This will be discussed further at the face to face.

Louis informed the members that the issue must be forwarded to the JC and with their approval, and then it may be forwarded to the full committee. Jenkins suggested sending out an email to the entire TAP for suggestions. Morizio will send out the email on Knispel's behalf.

Face to Face Meeting

The committee will meet in Atlanta, GA June 13 -14, 2008. All members received a copy of the Agenda for the meeting.

Morizio, Knispel, and Odom will have a pre-meeting 2 weeks prior to the face to face meeting.

Public Participation

None

Closing



**Vita Issue Committee Meeting Minutes
April 8, 2008
Teleconference**

Program Owner

- Gavaghan, Peggy
- Hollingsworth, Liz
- Burton, Roger

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bland, Sandra
- Bushchmann, Raymond
- Colvin, Elizabeth
- Coonradt, Richard
- Criel, Laura
- Davidson, Charles
- Florence, Jasponica
- Hutchinson, Carolyn
- Jackson, Robert
- Ling, Julia
- Mosler, Hank
- Rousseau, Richard
- Taylor, Rita
- Yandow, Robert

Committee Members Absent

- Bryant, Patricia
- Colombo, Paul
- Welch, Peter

TAP Staff

- Knispel, Marisa
- Odom, Meredith

Other Attendees

- Yanuck, Gil

Welcome and Review of Agenda

Rousseau welcomed everyone and informed them that the staff and he are currently working on the agenda for the face-to-face meeting in Atlanta. Knispel will share this agenda with all for their comments



before it becomes finalized.

Rousseau mentioned that the Area 2 is considering the inclusion of the preparation of Form K-1 in the VITA Program and wanted to share this issue (Issue 4515) with our Committee. As Committee Chair, he believes that this Issue would fit within the scope of the Broader Offering of Services Subcommittee. If the Subcommittee decides not to include the preparation of the K-1 as part of their recommendation, Rousseau will advise the Area 2 to propose their recommendation through regular TAP channels.

Roll Call

Quorum Met

Program Owner Presentation

Gavaghan informed the members that she and other SPEC representatives, the TAP staff and the subcommittee chairs held a private teleconference aimed to clarify the focus of the subcommittees. Rousseau indicated that this phone call proved to be very helpful and thanked Gavaghan and the others for taking their time in this call.

Subcommittee Report-Out:

Training VITA Volunteers

Criel informed the members that the Program has not set up a schedule for their revision of VITA's training materials for the next season. They will, however, invite the TAP's participation in this revision. Rousseau added that Link and Learn will be updated in the next months to come and the software will be distributed in November instead of December as it was done in the past.

Taxpayer Assistance Blueprint (TAB)-Collaboration Strategy

Davidson reiterated that the subcommittee chairs met with Rousseau, TAP staff and Program Owners to define the focus of their groups and their guidance has proven valuable by providing the baseline for the subcommittees' strategies. Currently this Subcommittee's members are contacting the community-based organizations that are involved with the Program such as the military to find what these organizations are currently doing and how their relationship could work better. Thereafter, the Subcommittee can generate new ideas to recruit volunteers and brainstorm on ways to form more partnerships. Davidson expects the Subcommittee to have a list of strategies presented to the IRS when we meet at the face-to-face meeting.

Coonradt reported that he contacted the AICPA and has received a response from the president of this organization. The AICPA president informed Coonradt that the AICPA's strategic plan calls for more pro-bono opportunities for their new CPAs. To accomplish this, they have established an Annual Tax Public Service Award. The AICPA president also provided Coonradt with the organization's strategy on their work with the Hurricane Katrina victims.



Rousseau added that the Subcommittee's aim is first to fact-find what is being done by the current IRS partners/coalitions so that they can suggest additional opportunities that the IRS could implement.

Taxpayer Assistance Blueprint (TAB) – Broader Offering of Services

Criel informed that she too participated in the call with the Program Owners and that the members are looking to increase the number and type of services done at VITA sites. Like the other TAB subcommittee, they too are conducting an informal fact-gathering survey from VITA site coordinators to find out what services they currently offer and what other services they think should be offered. By services, Criel means the preparation of forms and schedules and also educational opportunities and advice. Once the questions for this survey are compiled, she will share them with the rest of the VITA Committee for comments.

Rousseau reminded the participants that he had recently shared with them a questionnaire on the Software Project that he participated in and explained that the Subcommittee's survey – like the one used in this Project- will also be an informal one. That is one that will not require the concurrence of IRS executives and other channels. Rousseau does hope to share this survey with the rest of the TAP for input pending Bernie Coston's approval..

Public Participation

Yanuck said he is pleased to hear that the Committee wants to expand the training to include Schedule E's and K1's.

Closing

Rousseau thanked everyone for their participation and thanked everyone for their hard work.



**VITA Issue Committee Meeting Minutes
March 11, 2008**

Program Owner

- Burton, Roger
- Fuller, Nan Ellen
- Gavaghan, Peggy
- Hollingsworth, Liz

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Bryant, Patricia
- Buschmann, Raymond
- Colombo, Paul
- Colvin, A. Elizabeth
- Coonradt, Richard
- Criel, Laura
- Florence, Jasponica
- Ling, Julia
- Mosler, Henry
- Rousseau, Richard
- Taylor, Rita
- Yandow, Robert

Committee Members Absent

- Bland, Sandra
- Davidson, Charles
- Hutchinson, Carolyn
- Jackson, Robert
- Welch, Peter

TAP Staff

- Knispel, Marisa
- Odom, Meredith

Other Attendees

- Swartz, Steven

Welcome

Rousseau welcomed everyone to the call

Roll Call

Quorum met



Review Agenda

Rousseau indicated that Knispel had just received a list of the previous years ad hoc Vita items from Analyst Barbara Foley that he would like to review and share with the three subcommittees for further review.

Electronic Tax Software

Rousseau was invite to work with Analyst Cindy Jones and her team in Atlanta on the Electronic Tax Software Project. The IRS is considering bids for the next tax software (line Tax Wise) that will be used in the VITA and TCE programs. The IRS plans to award the contract by January 2009 for the software of tax year 2010. The team is currently working on the business requirements for the software. Rousseau sent a questionnaire to the Committee members to solicit input and suggestions on the software. He reminded all present to provide feedback and requested they email it to him within the next two days.

Stimulus Package

Rousseau has been sharing information on the Stimulus with all the Committee members and indicated that the IRS updates its website daily with information related to this event.

Subcommittee Report-Out

Training VITA Volunteers

Bryant reported that the subcommittee's assignment was to review Publication 4491, Student Training Guide, and Publication 678W. Bryant made some good comments on the test. She also indicated that their next meeting will be on March 20th.

Nan Ellen Fuller will provide more information on the VITA project in the months to come and thanked the members who participated in the project last year. She also answered Rousseau's question about this year's project and the TAP's participation in it saying that a small group might be invited to Atlanta again this year to cooperate with the IRS in this project.

Taxpayer Assistance Blueprint (TAB) – Collaboration Strategy

Rousseau indicated that at the moment this subcommittee is brainstorming ideas to increase collaboration between the IRS and community organizations.

Coonradt continued by reporting that they have reviewed the list of SPEC's national coalitions which is subdivided into different categories such as educational organizations, governmental, etc and that each subcommittee member was assigned a category to contact the organizations therein in order to get information that could help this subcommittee. Coonradt also believes that this Subcommittee's work should go hand in hand with the Broader Offering of Services Subcommittee's to expand services to the community. The members of Collaboration are also providing ideas on how to best recognize the volunteers for example, CPE credits to the professionals and school credits to students and a recognition ceremony.

Gavaghan mentioned that in the past some sites have had these recognition ceremonies and Bryant added that her opinion is that the IRS should not be involved in providing rewards to the volunteers to avoid the cost. She feels this should be done by the local organizations.

Rousseau, as chair of the VITA Committee, suggested that the SPEC subject matter experts participate in the subcommittee teleconferences to provide more guidance and focus.

Taxpayer Assistance Blueprint (TAB) – Broader Offering of Services

Criel reported that Beverly Thomas joined the subcommittee's discussion on March 7th and indicated the IRS needs to narrow the tax gap by offering of broader services in the volunteer program. This will be done by looking at the non-filers, the non-payers and the under-reporters. Since the IRS



already has a program established to address the non-filers, the subcommittee should concentrate on the non-payers and those who under-report by expanding the services at the VITA sites. The subcommittee will be looking into who these people are, what their needs might be, and determine if the solution is a matter of education or enforcement. The subcommittee also has a concern for the small business sole-proprietor filer. Furthermore, the members already have started to identify the target groups but they are waiting for more input.

Hollingsworth suggests looking at the issue from the perspective of all taxpayers and the general tax services they might need. In most VITA/TCE sites the main service provided is tax preparation assistance, she added. She also suggested that the members think of what types of outreach could be provided to taxpayers before they file their tax returns.

Public Participation

Schwartz asked about e-filing returns with zero AGI. Tax Wise has not provided the users with proper guidance for this situation which will a common one for taxpayers who want to take advantage of the Stimulus Package.

Closing

Due to technical difficulties on the phone line, the call ended prematurely.



VITA Issue Committee Meeting Minutes
February 12, 2008
2:00 P.M.
Teleconference

Welcome

Rousseau welcomed the members, IRS staff and guest.

Roll Call

Members Present

Buschmann, Raymond
Colombo, Paul
Colvin, A. Elizabeth
Coonradt, Richard
Criel, Laura
Hutchinson, Carolyn
Ling, Julia
Rousseau, Richard
Taylor, Rita
Welch, Peter
Yandow, Robert

Quorum Met

TAP Staff Present

Knispel, Marisa, Program Analyst & Acting DFO
Odom, Meredith, Management Assistant

Guest Present

Yanuk, Gil

Program Owners

Gavaghan, Peggy
Thomas, Beverly

Roll Call

Quorum Met

Review Agenda

Rousseau indicated that today's meeting will provide our subcommittees with more information and clarification on what they need to focus on. He also announced the Committee's decision to keep the name of our Committee as the VITA Issue Committee. However, he indicated that he wishes to revisit this decision at the face to face meeting.

Program Owner's Presentation

Gavaghan introduced Specialist Beverly Thomas who will provide an overview and clarification of the Taxpayer Assistance Blueprint (TAB). Thomas had provided us with a Power Point (attached) that further explains the TAB initiative by summarizing the two phases involved. Phase 1 was done in 2006 and Phase 2 in 2007.



The TAB Phase 1 Report was the preliminary research and reports five TAB Strategic Improvement Themes. The Phase 2 Report provides six Guiding Principles. Thomas indicated that only some of both, Themes and Principles are those that the SPEC is involved with (those marked in red) which are:

1. Improve and Expand Education and Awareness
2. Optimize the Use of Partner Services
3. Improve and Expand Training Support Tools to Enhance Assisted Services
4. Enhance the IRS website so that it becomes the first choice of more taxpayers for obtaining the information and services needed to comply with tax obligations.
5. Look into opportunities to assist these third parties in helping taxpayers understand and meet their tax obligations.
6. Enhance marketing, outreach and education to targeted populations to improve service awareness, access and quality.

This is based on the following Guiding Principles:

- Facilitate Compliance with Federal Tax Obligations
- Prevent, Minimize, and Correct Inadvertent Taxpayer Errors to Reduce the Tax Gap and Taxpayer Burden
- Prevent, Minimize, and Correct Taxpayer Noncompliance
- Make IRS Web Site More Effective for More Taxpayers and Partners to Obtain Information and Service
- Look for Opportunities to Assist Third Parties to Help Taxpayers Understand and Meet Tax Obligations

Thomas also referred to the Improvement Initiatives that must be implemented in FY 2008 and FY2009 and indicated that this Committee should focus on the FY 2009 Broader Offering of Services and the Collaboration Strategy.

Subcommittee Report-Out

Training VITA Volunteers

The subcommittee wants to be involved in the revision of this year's training VITA materials. They had some discussion on the test as they found it to be tricky and unclear. The subcommittee members will be surveying some of the sites' volunteers to get their reaction on this test. Criel, who reported for Bryant, added that this subcommittee will have a limited number of meetings during the filing season and that most of their work will be done via email.

Guest Gil Yanuck is concerned about the possibility of not having the Processed Based Training next year. Gavaghan replied that the problems with the TaxWise have not been resolved yet and are found to cause many problems.

Tax Wise, Gavaghan said, needs to be improved. She also replied to Criel's comments on the test saying that she (Gavaghan) has not heard any negative comments on it or that many of its questions were "tricky".

Taxpayer Assistance Blueprint (TAB) – Collaboration Strategy

Coonradt stated that this subcommittee decided to start their work by:

- A. reviewing the practitioner groups that are currently partnering with the IRS to offer free tax services to the community
- B. categorizing these groups



They have already received a long list of local partners from Knispel but they also need to know who the national partners are. Once these groups are identified, the subcommittee would like to contact several partners to learn their opinion on how to best improve collaboration efforts between the partners and the IRS.

Knispel will forward this local list of partners (obtained from the Intranet) to Beverly Thomas.

**Taxpayer Assistance Blueprint
(TAB) – Broader Offering of Services**

Criel indicated that this subcommittee would like to expand IRS services to small businesses. The members find that many people discover that they are "self-employed" and do not know of their filing or recordkeeping requirements. Thus, we must educate these people by using the existing coalitions or identify new partners that will. The subcommittee expects more guidance from the IRS on this issue.

Gavaghan would like the subcommittee to emphasize on the needs of people who do not have a business. What services would these individuals need? more forms and publications? More assistance in answering tax questions? Would they need financial education? So, Gavaghan suggests that the members focus on the current needs of the VITA sites and how the sites' services can be expanded.

Face-to-Face Meeting

The face to face meeting will be June 11 – 14 in Atlanta, GA.

Public Participation

Yanuk thanked the Committee for the work they did last year on the VITA materials.

Closing

Colvin commented that this meeting was very good and very helpful.

Rousseau congratulated the Committee for being ahead on their work as compared to other Issue Committee that apparently is still in the beginning stages of planning their subcommittees and their focus.