

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Planning Session Day 1 Meeting Minutes
August 24, 2021**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Special Projects Committee
- Jim Buttonow Chair, Taxpayer Communications Committee
- Bradford Folta Chair, Notices and Correspondence Committee
- Martha Lewis Chair, Tax Forms and Publications Committee
- Eugene "Gene" Lillie Chair, Taxpayer Assistant Centers Committee
- Robert "Bob" Moretti National TAP Chair
- Lacy Rice Chair, Toll-Free Phone Lines Committee
- Christine "Chris" Scott Chair, Internal Communications Committee
- Nina Tross National TAP Vice-Chair

Visiting Members

- Felecia Dixson Vice-Chair, Notices and Correspondence Committee
- Pamela Memmer Vice-Chair, Toll Free Phone Lines Committee
- Cynthia "CJ" Mills Member, Tax Forms and Publications Committee
- Charlie Simineo Vice-Chair, Taxpayer Assistant Centers Committee

Staff

- Kevin Brown Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Rosalind Matherne Program Analyst
- Matthew O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Fred Smith Program Analyst
- Kudiratu Usman-Olugunna Program Analyst

Members of The Public

None

Welcome

English welcomed everyone and opened the call at 1:30pm ET. Moretti reviewed the agenda.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English told the committee they have done a great job dealing with the many challenges that have come up this year. They worked the focus groups, tax forums, did outreach and helped with interviews this year. Those who are retiring off the committee have done an excellent job getting the word out about TAP.

- English spoke about the Advanced Child Credit.
- TAS case advocates are swamped this year with issues related to stimulus checks and refunds. This has caused a 30 percent increase in calls this year.
- There is a 63 percent increase of issues in the Systemic Advocacy Management System (SAMS). Most are about refunds, child tax credits and complaining about phone lines.
- We have 23 percent more referrals from last year.
- Don't get discouraged about issues not accepted. They are included in the Annual Report and may even be part of the National Taxpayer Advocate's (NTAs) Most Serious Problems (MSPs).
- English told the committee that we appreciate your efforts this year.

TAP Chair Report

Moretti spoke about some of the main and recurring issues experienced by each issue. One of these issues are inactive members. Moretti spoke about the accomplishments from last year's planning meeting that helped to address issues like getting the Local Taxpayer Advocate (LTA) list out and the mentorship program. Hearing this, Moretti encouraged members to think of things that need to be addressed for next year.

Online account issues seem to be a primary issue going forward this year.

Moretti spoke about what is planned for today's meeting. Moretti brought up the fact that there are a number of consolidated referrals with multiple committees working them.

TAP Vice Chair Report

Tross said this has been a rewarding year working with the vice-chairs and working on outreach issues this year.

2021 Project Committee Report Out

- Committee Activities and Accomplishments
- Challenges and Improvement Opportunities

Chris Scott- Chair, Internal Communications

Committee Activities and Accomplishments:

- The committee will be finalizing the move from a Facebook group to a page over the next month.
- Finalizing some tweaks to the www.tapspace.org user manual.
- Added a new TAP Instagram account.

Challenges and Improvement Opportunities:

- Major issue is how we can generate issues for the committee to work on. Scott thinks that this committee could be changed to an Ad Hoc function. Jimerson explained to the committee how the Internal Communications Committee (ICC) was formed and its purpose. This committee was formed to establish what we want our messaging to look like for TAP. The Annual Report used to be under this committee. The redesign of our Speak-Up brochure, our business cards and of www.tapspace.org were projects of the ICC. It's not just our outreach presence, but it is the messaging and branding of our committee despite things being slow this year. English reported that our committee was approved by the National Taxpayer Advocate (NTA), so if we want to make any changes, it will have to go to that level.

Bradford Folta- Chair, Notices and Correspondence

Committee Activities and Accomplishments:

- 14 issues elevated to the IRS this year.
- We consolidated our subcommittees into one working group to increase attendance.
- Good year productivity by committee.

Challenges and Improvement Opportunities:

- "Reply All" emails should be used with discretion.
- More Zoom calls for more productive and collaborative calls.

Martha Lewis- Chair, Tax Forms and Pubs.

Committee Activities and Accomplishments:

1. 11 Referrals and 30 recommendations elevated to the IRS.
2. 5 with 19 recommendations for the next JC meeting.
3. 9 Referrals 19 recommendations transferred from 2020.
4. 10 recommendations adopted by the IRS in 2021.
5. 1 partial adoption in 2021.
6. 8 non-adoptions in 2021.
7. 4 rebuttals in 2021 awaiting responses.

Lewis explained to her committee that non-adopted recommendations are not necessarily bad and provides an explanation when necessary.

Challenges and Improvement Opportunities:

1. Seven new members
2. Time is an issue for getting referrals through meetings.

3. Getting to know members in the all virtual environment. Our “Social Gatherings” help address this issue head-on. This gives her committee members a chance to get to know each other better and help them work issues better.
4. Virtual outreach is still a struggle for the committee and examples would help.

Gene Lillie- Chair, Taxpayer Assistance Centers

Committee Activities and Accomplishments:

N/A

Challenges and Improvement Opportunities:

- Improve the ability to learn from other committees and how they work with new members.
- Attending other committee meetings helps with learning how a committee functions and identify issues they are working on.

NOTE: Members are welcome to attend any other meetings if they so choose - Moretti.

- Improve pairing mentors and mentees.

Laurie Brock- Chair, Special Projects

Committee Activities and Accomplishments:

- Bringing two referrals to JC.
- Will be discussing rejected rebuttal.
- Working big view of all issues for taxpayers outside of the US and who don't have the same resources as taxpayers stateside.

Challenges and Improvement Opportunities:

- Getting other issues for other subcommittee to work on aside from international issues.

Jim Buttonow- Chair, Taxpayer Communications

Committee Activities and Accomplishments:

- Gave kudos to IRS for being accessible and so helpful to TAP.
- Thanked Moretti for reaching out and staying in touch with everyone this year.
- Recognized how important TAP is at being the voice of the taxpayer and helping to address important issues.

Challenges and Improvement Opportunities:

- Because the general theme is people who can't reach the IRS, we need more real-time influence to address taxpayer issues.
- We identified strategic issues to address these issues.
- Forming an Ad-Hoc committee for this issue with real-time comments to the IRS might be a way to accomplish this goal.

This will allow us to be more proactive instead of reactive. Moretti inquired about how to set such a committee up and maybe leave this as an action item.

Lacy Rice- Chair, Toll-Free Phone Lines

Committee Activities and Accomplishments:

- Were able to work with the IRS on some issues AP assistance. It was a great experience for the committee. We hope to work directly with the IRS on those online issues.
- The committee is still working on some issues and hoping to get our first referrals to JC next month. The two projects we worked on were from past issues the IRS had already implemented.
- We started some issues that had already been addressed by the IRS. There should be more immediate communication to avoid issues such as that.

Challenges and Improvement Opportunities:

1. An open line of communication to know what the IRS is implementing so we are not duplicating their efforts.
2. Training for the role of Chairs and Vice-Chairs should be improved.

(This will ensure the chair is better prepared for leadership moving forward. This will be helpful to include Chairs and Vice-Chairs before the JC first meets to give them brief training of their roles.)

3. Mentors and mentees from the same committee may be helpful.
4. Expand face to face to four hours on two separate days might be more helpful to new members.

Charlie Simineo- VC, Taxpayer Assistance Centers

- Knowing his role as vice-chair was a great challenge.
- Mentor call follow-up after the mentor training would be helpful.
- Has enjoyed working on the committee and through these issues.

Felecia Dixon- VC, Notices & Correspondence

Thanked Rosalia for his mentorship. Dixon spoke about how important it is to have a mentor to work with. Dixon worked really hard to keep members motivated and aware of what is required. Dixon had a great LTA that she was able to work with and get great outreach done.

The lack of face to face is a big issue. Face to face teaches you who you are working with and knowing their personalities. Zoom meetings are preferred over WebEx meetings. Learning what TAP does and how important our job is has been her biggest takeaway working on TAP.

Pamela Memmer- VC, Toll-Free Phone Lines

Memmer agreed mentors and mentees from the same committee works better. She enjoyed outreach and being able to introduce TAP to taxpayers unaware about who we are. Memmer suggested a better tool to know how to do outreach would help for next year.

CJ Mills- Member, Tax Forms & Pubs

- Agree with mentors and mentees coming from the same committee.
- Mix up committees like the social gathering suggested earlier.

- Mixing up committees also would be helpful to help getting to know more about members and be a more effective committee overall.
- Glad to be aware of all members being invited to all meetings. This is something she will be more involved in.

Public Comments

None

Round Table

Moretti suggested looking at activity reports differently to encourage members to complete and turn in these documents. One suggestion is to put the activity report in www.tapspace.org so they can enter it in real-time and promote more members turning these reports in. Jeans reported that the staff is still making revisions to www.tapspace.org and will have something to show the committee soon to incorporate the activity report input on the site. We want to add the activity report to TAPSpace to make it easier for members.

Rice suggested joint projects with our committees to broaden how issues are worked. Rice spoke about how having the activity reports going to Vice Chairs allowed him to speak to committee members and help them if they had any issues completing this form.

Jimerson spoke about the purpose of the mentorship program and the challenges of assigning mentors and mentees. Also, not everyone wants to be a mentor. The purpose is to give an overview of the TAP and the Chairs and Vice-Chairs are expected to mentor new members. Because of these sorts of challenges, we made changes on how we assigned mentors and mentees in this program. Tross spoke about how difficult for first-year members to be mentors since they are trying to learn the program themselves. Tross also spoke about how hard it is to keep track of who is on the TAP once people start leaving or being elevated to the TAP. There should be an updated membership list accessible for the committee.

Chair and Vice-Chair Responsibilities

Moretti reviewed these responsibilities and how important these topics are to get stuff done in TAP.

- Working with your Committee
It is important for leadership to be ready and able to lead your committee by organizing and making sure everyone takes an active role. The vice-chair is keeping track of activity reports and ideas for outreach. They also complete the monthly newsletter articles.
- Mentoring
This should not be a first-year member. It should be someone established.
- Attendance

This is important, but we need to find a way to encourage everyone to be available and having the time to do this job. Between meetings are good times to get work done on issues.

- Project Workflow Guidance
Chairs have to figure out a way to move the process on via phone and email.
- Referral Concurrence Assessment
Referrals don't have to be perfect; it just has to make a point and get to the IRS to be reviewed.

(Provide your advice on the above topics and when appropriate seek feedback or suggestions to make improvements. This could result in for example, TAP Staff providing structure and guidance on how mentoring expectations.)

Outreach Strategy

Tross suggested Slack as a dedicated email software system to improve communications.

- Virtual Outreach Campaign
This has been hard for everybody since some don't even have access to the virtual environment. Consideration has to be given to members who don't do outreach that way.
- Newsletter
We have good participation for the newsletter, so it is a viable tool for us to continue to use.
- Member Successes
We get the successes, but some are struggling to find opportunities. Tross suggests a program to help them and give them a boost to do better at outreach.
- Outreach Best Practices/Sources
The LTAs, Low-Income Tax Clinics (LITCs), Electronic Tax Administration Advisory Committee (ETAAC), and Internal Revenue Service Advisory Council (IRSAC). Tross acknowledged this will get easier once the country starts opening up and making these interactions more person to person.

Virtual Tax Forum Comments

1. The lack of a case resolution room in the tax forums was a big issue since this is an option to get many issues resolved for taxpayers during these types of events.
2. The "10 things about TAP" during the tax forums flashed way too quickly to be seen.
3. Not knowing if a taxpayer was spoken to in the tax forums caused a lot of issues.
4. Members being misidentified during the tax forums were a huge issue.

Action Items

- Send any questions for the guests to speak about tomorrow to Rosalia.
- Send challenges and improvement opportunities in greater detail to Rosalia via email.



Closing

English thanked everyone for a great meeting. English closed the meeting at 3:19pm ET.

Next Joint Committee Meeting August 25, 2021 at 1:30pm ET

These minutes have been approved and certified by the committee chairperson.