

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes Day 1
August 9, 2022**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Special Projects Committee
- Charles Jones Chair, Notices and Correspondence Committee
- Martha Lewis National TAP Chair
- Eugene “Gene” Lillie National TAP Vice-Chair
- Angela Madison Chair, Internal Communications Committee
- Richard “Rick” Rodriguez Chair, Toll-Free Phone Lines Committee
- Christine “Chris” Scott Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistance Center Improvements Committee
- Leigh Ann Wood Chair, Taxpayer Communications Committee

Visiting Members

- Rebecca Lammers Member, Special Projects Committee
- George Williams Member, Toll-Free Phone Lines Committee

Staff

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Rosalind Matherne TAP Program Analyst
- Gilbert Martinez TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith Program Analyst
- Maryclaire Ramsey Executive Director Communications, Stakeholder Liaison & Online Services (CSO)
- Sheila Andrews Dep. Executive Director CSO
- Michael Odom Program Analyst Wages & Investment (W&I)

Roll Call

Quorum was met for the meeting.

Members of The Public

None

Welcome

English welcomed everyone and thanked the members for traveling for the meeting and hoped everyone had a safe time doing so. English opened the call at 8:30am ET and then notified the committee there would be a change to the agenda. Erin Collins, the National Taxpayer Advocate (NTA), would be speaking to the committee first this morning.

Taxpayer Advocate Service Updates

Erin Collins, the National Taxpayer Advocate (NTA), welcomed TAP and thanked the committee for all their work this year. The NTA recognized the challenges that both the committee as well as IRS, in general, have faced over the last two years and commended the committee for their commitment to helping improve the IRS.

Collins reminded the committee that their efforts continue to add value to the Most Serious Problems (MSPs) that will be part of her report to Congress. Collins shared that the IRS, with the implementation of the Inflation Reduction Act of 2022, will be granted additional funding to address staffing and resource needs and TAS was included in this part of the budget.

Collins asked that TAP continue to focus on improving the IRS through their grassroots efforts and then welcomed questions from the committee.

DFO/National Office Updates

English discussed how the meeting would run and the things that were coming up. She spoke with the committee about how lunch would be brought in for the day. English indicated that later in the day, we will also discuss the reorganization of the TAP committees.

English spoke about Ad Hoc committee meetings and the importance of Chairs being involved in the meetings. English also talked about the travel and the importance of getting information back to the administrative staff, so there are no delays in processing.

Introductions- Ice Breaker

English guided the committee with an icebreaker to start the day.

****Break****

Welcome/Announcements/Comments Acknowledgement of Citizens and Review of Agenda

Lewis welcomed everyone and reviewed the agenda. Lewis reported to the committee that the 2022 TAP graduating ceremony would feature a yearbook for those retiring off the panel. In preparation, Lewis asked graduating members to submit a picture of themselves that they liked

for this project. Lewis also asked for a quote to highlight what they remember most about TAP. Lillie proposed making an individual video to upload to www.tapspace.org. It should be 30 seconds or shorter so it can be easily transferred. Other guidelines will be discussed. Lindsey Pope will help work on this.

TAP Vice Chair Report

Outreach Strategy

Virtual Outreach Campaign

Lillie proposed a more detailed virtual outreach campaign to include using multiple social media options like Facebook, LinkedIn, Instagram, etc.

Closing the Deal

Lillie would like video examples of closing the deal to be shared with the committees. We need to do a better job of screening issues to identify systemic issues.

Member Successes

Lillie indicated that we need to do a better job highlighting member successes for those who have done the work and as a way to give ideas to those who may be struggling with outreach efforts.

Outreach Best Practices/Sources

Lillie is looking to expand opportunities for the members to share best practices and resources.

2022 Project Committee Report Out

Chris Scott- Tax Forms and Publications

- Committee Activities and Accomplishments

Scott reported we want members to keep doing the work they are doing since there was a slow start to the year. There should be a better way to work through an email chain since it can be hard to follow with so many emails in a single email chain. The goal is to be sure we are responding to the most recent email and get the changes up to date as we share them. Smith indicated this can be better done in www.tapspace.org.

- Challenges and Improvement Opportunities

We are struggling some, but we need to commend the members for stepping up.

- Best Practices

None were mentioned.

Angela Madison- Internal Communications

- Committee Activities and Accomplishments

We are looking to brand TAP for easy recognition for the photos that we share. We should be more intentional and effective to get the TAP message out to help taxpayers. We are looking for creative ways to do this. We will create a new Facebook page and create a bank for post ideas.

- Challenges and Improvement Opportunities

Being new was a challenge. While reviewing the TAP handbook, we wanted to do two chapters at a time to be more efficient, but we had to start this project off slower. An area of struggle is trying to get better participation with the committee.

- Best Practices

The background work to regain control of the Facebook page is still being done. The newsletter template was sent for members to submit newsletter articles. Madison will send it out again for TAP. This makes it easier and less time-consuming for the letter. O'Sullivan and Madison will send it to the TAP.

Laurie Brock- Special Projects

- Committee Activities and Accomplishments

There has been great participation while we have spent a lot of time on issue responses, which is very good for the committee.

- Challenges and Improvement Opportunities

Completing the activity logs is one of our biggest challenges and we are still struggling with this effort.

- Best Practices

We should start sharing the JC minutes with TAP, so members know what other committees are doing. We are getting good feedback from our committee members. It would be nice to get monthly or quarterly reports or updates on issues elevated to the IRS. The IRS should share their timeline for the improvements they intend to implement per our recommendations, so we are better able to follow them.

When will we get feedback on the issue submission and the screening process, so we are better able to deal with issues already implemented by the IRS? This should include a focus on the rejected issues, so our members know that our efforts were not a waste of time.

Nina Tross- TAC

- Committee Activities and Accomplishments

We are working on signage about restricted activity inside the TAC and access to TACs overall. We have no expectations; we just want to get our voice out and to the IRS about these issues.

- Challenges and Improvement Opportunities

The question came up about the core hours and time commitment causing members to leave. How can we avoid losing members because of this? Interview questions have been changed to clearly explain to applicants what the commitment is for TAP. Face-to-face training is better to give applicants a clearer understanding. We also need to explain the commitment and give tools to new members to help them succeed said Charles Jones. Lewis indicated the interview questions were so much better this year. The IRS liaisons are a weak link sometimes.

- Best Practices

None given.

Rick Rodriguez- Toll-Free

- Committee Activities and Accomplishments

None given.

- Challenges and Improvement Opportunities

There are lots of issues to deal with, which is really an eye-opening experience being on TAP. Articulating the issues is really important to be able to solve them. Some issues are not real issues, and we need to recognize this before starting to work on them. This may be resolved in our screening process or by ensuring all TAP committees are communicating with each other.

- Best Practices

None given

Leigh Ann Wood- Taxpayer Communications

- Committee Activities and Accomplishments

Hopefully, we will have approved issues for JC in the next month or two.

- Challenges and Improvement Opportunities

Wood indicated that her committee has had issues finding stuff on www.tapspace.org once they uploaded them. The activity report should be tweaked for a better way to complete it that is similar to the Spreadsheet. English asked members to share ideas with the TAP staff for these improvements. Lillie added that making it understandable or readable is another issue we need to solve. Unspecific logging options “other” are issues to inputting the information. English asked that members share these with their analysts and managers. Wood said we should allow a dialog box for the “Other” section in case we need to explain part of our input.

- Best Practices

We should connect more to make sure we are not duplicating either other’s effort.

Charles Jones- Notices & Correspondence

- Committee Activities and Accomplishments

Everyone knows their job and they are doing it.

- Challenges and Improvement Opportunities

There should be a greater focus on issues carried over from last year. This is important because we may end up working on issues that have already been addressed if we are not aware of them. How do we get rid of people faster if they are not involved? English indicated there is a process.

- Best Practices

We should give each member the tools to make them successful from the beginning of the year.

Chris Scott- Tax Forms and Publications

- Committee Activities and Accomplishments

Scott reported that Lillie had amazing accomplishments with outreach this year.

- Challenges and Improvement Opportunities

Navigating www.Tap.space.org and finding stuff on the site is a challenge. We should work closer with staff to improve the website. Please share our ideas for this with the staff. The site should be improved to help connect issues and members together.

- Best Practices

Face to face is a much easier way to resolve issues.

Chair and Vice Chair Responsibilities

The staff reviewed what the TAP Chair and Vice-Chair responsibilities are in detail for those who might be interested in being in these positions next year....

****Break****

Elevated Referrals

Some things to consider:

- Formatting

Focus on keeping it simple and not on the punctuation in the referrals. Avoiding drama on the JC calls.

- Identifying significant recommendations other than Bolding....

Focus on the substance of the recommendations and how they can be improved instead of the small things regarding the product.

- Rebuttal and informing the JC (No voting, just informative)
Cursory review by other committees if needed

Report on rebuttals during the JC meetings for our information. Review the pre-reads before the meeting.

Martinez will adjust sending the new attachments or changes on the invite to make it easier for the upcoming JC meetings that have a new referral. An additional email indicating the new or late additions to the meeting will be included in any emails notifying the committee of the updates for the meeting to come.

Chair Election Planning

New Ideas – Time Commitment & Responsibilities

Charles Jones will be the election official.

You can self-nominate or nominate a committee member you think will be a good fit. After the nominations, those running for office will submit a campaign statement. After the vote, Martinez and Jones will tally up the votes.

Martinez gave an overview of the process and intends to complete the vote by the end of October. November will be the month for preparing the new Chair and Vice Chair. Jeans suggested leaving transition notes for the new Chairs.

Activity Report Analysis

Jeans explained the process for this year and spoke about specifics in the report. Jeans focused on Outreach Repository, where we have reached out to large groups. This could be a list to refer to for outreach options, including working with the Local Taxpayer Advocates.

Jeans reviewed how to focus on a specific committee to review their outreach information. This can allow the Chair or Vice-Chair to speak to members who have not reported or may not be doing as much outreach. The newsletter can be used as a guide to do outreach.

Jeans gave a quick tutorial on inputting activity in the system to ensure it is being properly filled out. Jones spoke about getting a running total for hours. Jeans indicated we are working on this feature for next year.

Annual Report Template

Martinez stated that we will want to start working on the committee Chair reports for the annual report. Martinez reviewed this process and the template with the committee. There will be reviews or edits of the reports and they will be sent to the Chairs to accept or deny them. Two weeks will be the time allowed for a response. Then another review will be done in November, and one more review after that with the final draft being due by December.

Martinez reviewed the 2021 Annual Report and noted the changes to include pictures that were added. There will be a section for the 20-year anniversary of TAP in the new report. Martinez will send the template to the committee. There will be an Ad Hoc Annual Report committee for the review and the JC will have input in this process. Give your members a head's up for the Ad Hoc committee so they can consider joining it. Require Word track changes, per Scott. Martinez will send the dates out to everyone soon.

There was a discussion about reorganizing the TAP committees. Several other ideas were discussed, but time did not permit for this to be finished, so they were tabled for a later time.

Action Items

- Screening report high-level unified report for all committees, Martinez.
- Improve communications with all committees.
- Opportunities to work with other committees to include all taxpayers who need assistance.



- Identify how many times an issue comes in and is closed out.
- Have Subject Matter Expert (SME) input to prevent duplicating what the IRS is working on.
- Face to Face is beneficial.
- Grouping committees by location for easier access for outreach.

Public Input/Closing

None

Closing

English thanked the committee for all of their work and closed the meeting at 3:50pm ET.

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Taxpayer Advocacy Panel (TAP)
Meeting Minutes Day 2
August 10, 2022**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Special Projects Committee
- Charles Jones Chair, Notices and Correspondence Committee
- Martha Lewis National TAP Chair
- Eugene “Gene” Lillie National TAP Vice-Chair
- Angela Madison Chair, Internal Communications Committee
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- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith Program Analyst
- Maryclaire Ramsey Executive Director Communications, Stakeholder Liaison & Online Services (CSO)
- Sheila Andrews Dep. Executive Director CSO
- Cynthia “Cindy” Jones Supervisor Wage & Investments (W&I)
- Michael Odom Program Analyst W&I

Welcome/Opening

Terrie English opened the meeting at 8:00am ET and welcomed everyone.

Day 1 Recap

English/Martinez reviewed the highlights from day one for the committee.

Welcome/Announcements/Comments/Acknowledgement of Citizens and Review of Agenda

Martha Lewis welcomed everyone to the meeting and reviewed the agenda.

Ice Breaker

English guided the committee with an icebreaker to start the day.

Systemic Advocacy Update

Kim Stewart, Executive Director of Systemic Advocacy, talked about the state of Systemic Advocacy (SA) and mentioned the type of work they do, such as the Annual Report to Congress (ARC), immediate interventions and Internal Management Documents Single Point of Contact (IMD SPOC). She went on to talk about the objectives report and what to expect for the upcoming Annual Report to Congress. She thanked TAP for the hard work along with partnering with SA on various focus groups.

Wage and Investment (W&I) Liaison Update

Cindy Jones gave an overall review of the Wage and Investments role with TAP and fielded questions from the committee afterward. There were questions posed about the call-back policies. Jones indicated they are piloting this project and performance measures of the statics of who is answering and if they are not being answering.

Media Training

Lindsey Pope gave an overview of how to deal with media interactions. Ramsey suggested deflecting mainly tax questions but responding to media questions without being confrontational. Follow your notes if you need them to aid you in the interview. Write notes or anything important you want to remember before the interview that you might need. Sound bites are the best way to avoid being taken out of context. Confront wrong information right away by correcting yourself on the spot or go back and correct it if you realize it was wrong. Be aware of your body language when you respond, so you are not sending mixed messages.

******Break******

Brainstorming

TAP will work on Local Taxpayer Appreciation Day on January 14, 2023, and we should be able to prepare for full participation. Lillie and Madison will work further on this effort. Madison will write up a communications plan for this outreach effort. This effort will be headed by the Outreach Committee.

Why did you join TAP? Have you shared TAP with other people?

Jones- Resume builder then it became much more of a source of pride. Yes.

Scott- Being retired and staying busy and using her skills to help people. Yes.

Madison- Was angry at the IRS and saw this as an opportunity to fix something that was wrong. Yes.

Brock- Was inspired by her business partner to do this because she was seen as a good fit for it. Yes.

Tross- This is a role that appealed to her, so she did it, and although it is different, it is more taxpayer friendly and is better than the other opportunities she has been a part of. Yes.

Rodriguez- I saw this as an opportunity to serve taxpayers that need a better IRS. Yes

Wood- This was something I could do to address some tax issues I saw in my community. Yes.

Lillie- I have been a tax professional for a long time and this was a great opportunity to make some much needed changes in the IRS. Yes.

Lewis- I love volunteering and helping people, so this was a great way to fix some issues I saw that needed to be addressed in the IRS. Yes.

Future of TAP

TAP members were provided an exercise to determine the restructuring of TAP committees. The members worked on coming up with new focus for each of the committees. Some of the news areas of focus included: Human Support; Taxpayer Correspondence; Digital Services; Technology Advancements; Taxpayer Education; and Community Support.

Local Taxpayer Advocate Collaborative Efforts

LTA-Gayvial James led a discussion on LTA-TAP outreach activities. Several members discussed their LTA interactions and outreach activities they have been involved with. This led to a discussion on how to ensure TAP members get to know the LTA for their state and increase efforts to facilitate the LTA-TAP member interactions.

Public Input/Closing

English led the recap on the meeting discussions which included reminders on travel and meeting action items from Martinez. No comments from the public. The meeting officially closed with thank you to the members and other participants and wished for safe travels.

Next Joint Committee Meeting August 25, 2022, at 1:30pm

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