



**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, July 13, 2023**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- Michelle Brookens Taylorville, IL Vice Chair
- Candace Smith Mustang, OK Member
- James (Jim) Wiseman Brentwood, TN Member

**Members Absent**

- Melanie Almeida Sandpoint, ID Member
- Richard Bell Corpus Christi, TX Member
- Denise Besson Trufant, MI Chair
- Ruth Guyon Bellevue, NE Member
- Tracey Randall-York Ontario, CA Member
- Joanne Thurston Marietta, GA Member

**Staff**

- Frank Bustos Acting, TAP Director
- Conchata Holloway TAP Program Analyst
- Hannah Jair TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Annie Gold TAP Administrative Assistant
- Mejbeen Balsara W&I

**Public:**

- Andrew VanSingel Stakeholders Partnership Education & Communications (SPEC)

**Quorum**

A quorum was not met.

**Welcome and DFO Report**



Susan Jimerson opened the meeting and welcomed everyone to the call. The agenda was reviewed. Michelle Brookens will be sharing information for Denise Besson who could not be on the call today. The following updates were shared:

- July 17, 2023, Joint Committee meeting beginning at 3:00 PM, EST
- July 18, 2023, Internal Communications Committee (ICC) beginning at 12:00 PM, EST
- July 19, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EST
- July 24, 2023, Joint Committee's monthly meeting beginning at 3:00 PM, EST

### **National Office Update**

Frank Bustos welcomed James Wiseman, Michelle Brookens, and Andrew VanSingel to the call. The following information was shared:

- This will be the last official meeting Bustos will be attending as Acting TAP Director. His Detail with TAP has come to an end. He thanked everyone for their well wishes and the opportunity to work with TCC
- TAS is now conducting the Tax Forums. Currently New Orleans, LA Tax Forum is in progress. Rita Green has a table set up and it is going well. She is having a lot of participation and information being shared about TAP. Information will be shared from some of the speakers who will be participating at the forums
- Part of the Inflationary Reduction Act, IRS was task with providing Congress with a report for the possibility of Taxpayers being able to direct E-File. Since they delivered the report some opposition in Congress on whether they believe IRS should expand their authority to provide the free service.
- Members were encouraged to participate in the forums

### **Chair Report**

Michelle Brookens stated Melanie Almeida was present during TCC June 08, 2023, full committee meeting.

### **Minutes Approval**

Conchata Holloway stated she would make the correction showing Almeida as present. The minutes will be approved during next month full Committee meeting.

### **Public Comment**

Andrew VanSingel thanked everyone. He reached out to Brookens and was invited to attend TCC meeting. He shared information how SPEC is closely aligned with TAP. Stakeholder Partnership Education Communication (SPEC) administer the VITA TCE program, providing free Tax preparation for low to moderate individuals. They also do a lot of Outreach. He encouraged members to make sure they know who their LTA contact is and who the SPEC Manager



along with who the Territory Manager is. They are always out in the communities doing Outreach.

- Currently SPEC is working on EITC Reset calls. They will be doing an EITC awareness initiative in a month or so
- They organize a Rural Partner Act days where they will try and put emphasis together and get out into the rural areas of less than five hundred people per square mile. Some counties will not be included in Indiana and Illinois which are ninety-five percent rural minus Cook, Marion Counties. SPEC will set up Tax prep, controversy and help assist individuals to get set up with IDPN accounts, transcripts
- Members were encouraged to reach out to their LTA or send him an email to Conchata and she will forward to him with questions.
- James Wiseman asked for the meaning of SPEC, Stakeholder Partnership Education Communications
- Bustos added when members join TAP they are provided with a list of LTAs. He asked if SPEC had a list for customer service representative per state. VanSingel will provide the list to provide to members and he stated he advocates for members to think of SPEC on the same lines as TAS. Reach out for assistance.
- SPEC is owned and under Wage and Investment (W&I) of Internal Revenue Service. They provide Tax services to individuals but specialize in Tax preparation. VanSingel stated he assist in all areas

Jimerson thanked VanSingel for joining the call and share valuable information.

### **Program Owner Report**

Mejbeen Balsara stated there were no updates. She is looking forward to working with each member and working through recommendations.

### **Subcommittee Report**

#### **Subcommittee 1**

James Wiseman shared the following updates:

- Issue #54250, Increase Electronic Filing of Forms and Returns, Subcommittee one recommended closing this issue. There were several issues with other committees and there are two of these items open with questions: ID #2344 and #2355. IRS responded with a non-adopt. Subcommittee recommendation is to accept IRS response
- Subcommittee 1 is working on a Referral #48868, Update Contact and Banking Information. They are working a future referral relating to that item. They are looking at updating messaging and search terms within the IRS website

#### **Subcommittee 2**

Holloway shared the following updates for Subcommittee 2:

- Issue #52477, IRS Web Browser, Subcommittee 2 received IRS response. They recommended closings the issue.
- Issue #66193, Effectively Measuring Outreach, the subcommittee were going to vote to move forward to the Joint Committee providing no changes from SA or Attorney Advisor. There are three recommendations with this issue. Approval will be held next month during the full committee meeting

### **Outreach Report**

Brookens shared the following updates:

- The Outreach Committee discussed social media and the need to have more than one administrator on social media to be a password holder
- Monthly newsletter submissions were discussed and [www.TAPSpace.org](http://www.TAPSpace.org) activity records
- The total Activity hours 845
- The Tax Forums is happening now in New Orleans, Atlanta is scheduled for July 25–27 with Joanne Thurston, DC begins on August 08-10 with MA representative NDC, San Diego is scheduled for August 22-24 with Almeida and representative from AZ, Brookens will attend in Orlando on August 29-31 with a representative from CA
- Discussion during the Outreach meeting were the need for supplies: tablecloths, signage, SpeakUp Brochures
- The next Outreach meeting will be held on July 19, 2023

### **Internal Communications Committee**

Brookens stated the ICC Newsletter article submission has been assigned out up to the end of the year. Submission are being reported in a timely manner. Candace Smith will be submitting the article next. Any questions Holloway is available. The articles are due by the twenty-fifth of each month. Jimerson added the apology for the delay in completing the Newsletter article for this month.

### **Action Items**

Holloway shared the following Action items:

- The August Newsletter article is due by July 25, 2023.
- All items to be approved will be approved on August 10, 2023
- Reach out to VanSingel to partner with him to see what he has available for members
- Bustos added Eugene Lille will attend the forum in Washington, DC as a participant. If anyone wants copies of the items obtained from the forum, contact Lillie and he will provide members with copies
- Discussions were held during TAC meeting on whether there were any issues precluding work on issue referrals. If the referral has already gone through the process: SA, Attorney Advisor and up to the Joint Committee, Bustos stated he did not see a reason a reason to list some of the items



being currently worked. Look back at referrals that went through the process and approved by IRS would be helpful going forward

### **Roundtable**

- James Wiseman extended thank you to Bustos for his leadership and hope to see him in the future. He stated updating [www.TAPSPace.org](http://www.TAPSPace.org) is a hit or miss ongoing effort.
- Candace Smith thanked Bustos and she will share the draft for the Newsletter before the deadline
- Angela Madison encouraged members to send any Outreach they are participating in to increase awareness of how Taxpayers are being affected. Information not available to the public will be posted if members share it with the Outreach Committee. Outreach meeting will be posted to try and get public participation. She thanked Brookens for inviting VanSingel to the meeting. He provided phenomenal information and connecting the TCC with SPEC. She expressed her appreciation to Bustos for his support and an awesome job. He will be missed and thank you from the entire body of TAP
- Matthew O'Sullivan stated he is working one on one with member on their [www.TAPSPace.org](http://www.TAPSPace.org) issues

Jimerson thanked Brookens for leading the meeting and everyone for joining the call. Great job inviting VanSingel who provided great information. Members who may have questions were encouraged to reach out to Jimerson. Her door is open.

### **Close**

The meeting was officially closed at 12:51 PM, EST.

**Next Meeting: Thursday, August 10, 2023  
12:00 PM EDT, 11:00 AM CDT, 10:00 AM MDT, 9:00 AM PDT**

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