

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, November 14, 2023**

**Designated Federal Officer**

- Susan Jimerson Designated Federal Officer

**Attendance**

- |                     |                |            |
|---------------------|----------------|------------|
| • Daniel Leatham    | Shrewsbury, MA | Vice Chair |
| • Cynthia Mills     | Glenside, PA   | Chair      |
| • David Newingham   | Henderson, NV  | Member     |
| • Joseph Parampathu | Irvine, CA     | Member     |
| • Charlie Simineo   | Cheyenne, WY   | Member     |

**Member Absent**

- |                      |                 |        |
|----------------------|-----------------|--------|
| • Anthony Jackson Jr | New Orleans, LA | Member |
| • Danielle Roberts   | Charlotte, NC   | Member |

**Staff**

- |                      |                              |
|----------------------|------------------------------|
| • Matthew O'Sullivan | TAP Program Analyst          |
| • Conchata Holloway  | TAP Program Analyst          |
| • Annie Gold         | TAP Administrative Assistant |

**Members of the Public**

None

**Quorum**

Quorum was met.

**Welcome and DFO Report**

Susan Jimerson opened the meeting by welcoming members to the call. Shawn Collins, TAP Director will not be on the call today. An overview of the agenda was shared and the following DFO Report:

- November 15, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EDT
- November 16, 2023, the Joint Committee will have their first meeting at 3:00 PM, EDT
- November 21, 2023, ICC Ad Hoc meeting will begin at 12:00PM, EDT
- November 27, 2023, the Joint Committee will have their second and last meeting. The last of the referrals will be pushed
- November 28, 2023, Graduation Ceremony begins at 11:00AM, EDT for the retiring seventeen members

- Congratulations and best wishes to Cynthia Mills, Charles Simineo and Daniel Leatham retiring members from TAC

### **Chair Report**

Cynthia Mills welcomed members to the call and shared following Chair Report:

- This will be the final meeting and Chair Report for TAC this year
- The TAC Chair Report submitted is the TAC input explaining TAC access, expanded hours and service. It addresses everything the committee addressed in TAP year 2023. This includes the issues that were elevated to IRS, ongoing work, and issues under consideration for TAP year 2024. The achievements of TAC members
- Appreciation and thank you were expressed to members for their efforts and Staff for their ongoing work. Mills added it has been a pleasure to be the TAC Chair

### **Minutes Approval**

October 10, 2023, TAC Minutes were approved as accepted and printed. Charles Simineo moved, and accepted as printed

### **Public Comment**

Philip Hwang stated he had no comments.

### **Program Owner Report**

Not available during the call.

### **Subcommittee Report**

Subcommittee 1

Charlie Simineo stated Subcommittee 1 discussed the project referral on last week.

Full Committee discussed and edited to finalize before moving forward.

**Simineo motioned to present the referral to the Joint Committee and David Newingham seconded.**

**Decision: Full Committee Consensus forward to the Joint Committee.**

Matthew O'Sullivan will update in SAMs and forward to Conchata Holloway to be added to the Joint committee agenda for November 27, 2023, and send a copy to members.

Simineo expressed appreciation and thank you to the committee for being able to work with each member.

Subcommittee 2

Daniel Leatham expressed appreciation to members and Staff for the three years of working together. He shared the following updates for Subcommittee 2:

- Issue 41122, Accessibility of TAC Offices the IRS response was adopted by Subcommittee 2 with contingency of an update with final response by

April or May 2024, if possible. This issue is closed. O'Sullivan will close in SAMs and follow up.

**Leatham motioned and Mills seconded.**

**Decision: Full Committee Consensus approved close Issue #41122**

- The remainder of issues with Subcommittee 2 will be carried over to next year to be worked. Issues: #66145, #62231, #68593, and #68594

### **Screening Committee Report**

Joseph Parampathu shared the final Screening Committee Report for the year. The Screening Committee did not have a meeting due to there were only two items not expected to be pick up by the committee. They anticipate carrying them over to next year to be worked.

### **Outreach Report**

Leatham stated the Outreach Committee met on October 18, 2023,

- November 15, 2023, Outreach Committee will have their last meeting for the year
- Appreciation and thank you were expressed to members with congratulations to the third year members.
- Outreach is not just for Tax organizations. It could be for with anyone: family, friends, or anyone. They do not need to have knowledge of Tax law or how to prepare Tax returns
- Continue to share Outreach with members of the public
- Members who may need supplies were encouraged to send their request to the Analyst, O'Sullivan, Kevin Brown, or Annie Gold
- Members were reminded to share information to be posted to Leatham to be added to the Facebook page. Mills and Newingham were asked to submit their information as soon as possible to Leatham. Mills asked if the posting she has on [www.TAPSpace.org](http://www.TAPSpace.org) good. She will edit with additional information

Jimerson shared the following information about the Annual Report:

- Members Outreach Reports are not just to report individual hours spent doing Outreach. All hours go into the Annual Report and are compiled to get the overall numbers for the Annual Report.
- Members were encouraged to update their Activity Report
- Leatham reminded members who have photos should forward to Eugene Lillie as soon as possible. Jimerson added a message was sent to members to send the pictures to the Analyst. The pictures must be stored for the Staff to work with Communications Stakeholders Liaison and Online Services to get pictures that will look professional. If the pictures are not able to be included this year, they will be incorporated next year and getting an early start on next year.
- Leatham asked if third-year members would be able to receive a hard copy of the Annual Report. Jimerson assured him they would be receiving a copy in the mail.

### **Internal Communications**

Leatham shared the following updates for ICC:

- ICC will have their final meeting on next week
- Their last meeting was held on October 17, 2023
- Discussions were held on the Facebook Page. A meeting was held prior to the ICC meeting on what was posted on the page, the frequency of postings
- Leatham will do the posting for November. He will follow up with Parampathu and Angela Madison for additional content
- Discussions were held about [www.TAPSpace.org](http://www.TAPSpace.org) improvements. Members were encouraged if they see anything that needs improvement to share the information with ICC
- ICC has two issues they are working: Issue #68481, Allowing Members of the Public to join TAP meetings. The consensus was to move the issue over to the Outreach. O'Sullivan stated the issue is still in the inventory, but Outreach is doing the work
- Issue 69169, Allow VITA/TCE Sites to order SpeakUp Brochures has been forwarded to the Joint Committee for approval in October. O'Sullivan will follow up and report back to the ICC next meeting
- Issue 68950, Improve TAP Signage and Material for in-person meetings. The decision was to move this issue over to Outreach to work

### **Action Items**

O'Sullivan stated he will complete the following action items:

- Post the approved October 10, 2023, minutes to [www.TAPSpace.org](http://www.TAPSpace.org) and forward to Kevin Brown for posting [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Update the information in the system from the Screening Report
- Forward Issue 66143 to Conchata Holloway to be added to the Joint Committee's agenda.
- Close Issue 41122 on SAMs as accepted IRS response and monitor with a response to the committee in March or April
- Parampathu and Newingham were asked to stay with TAC for next year
- Thank you expressed to the members on the call for their dedication and commitment

### **Roundtable**

Mills asked for comments for the Roundtable

- Newingham asked how to remain on TAC. Jimerson shared the following: a solicitation for the committee members would like to serve on. Members will get a first, second and third choice. The solicitation will be sent out next month. Members deciding to return to the TAC will receive consideration. There are seventeen TAP members graduating. There will be at least seventeen new members and possibly more. The assignments will be balanced out with the six TAP Committees.

- Leatham added he will forward the Newsletter article to Mills and O'Sullivan by tomorrow
- Members were asked to share information on what was working for them or what suggestions they may have to help improve. Mills and Jimerson both agreed
- Mills shared members are diligently working on the By-Laws and taking over into next year to work.
- Mills expressed she will miss everyone
- Encouragement shared with Parampathu to run for Chair by Newingham and Parampathu encouraged Newingham to run for Chair

### **Closing**

Jimerson expressed thank you to the full committee for their attendance, hard work, and dedication. Congratulations to the graduates it will be sad to see them go.

The meeting was officially closed at 2:55 PM, EDT.

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