



**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, October 13, 2022**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- Philip George Saint George, UT Member
- Anthony Jackson Jr New Orleans, LA Member
- Paula King Lexington, KY Member
- David Newingham Henderson, NV Member
- Charlie Simineo Cheyenne, WY Vice Chair
- Nina Tross Apollo Beach, FL Chair

**Member Absent**

- Denise Andrews Katy, TX Member
- Mikaela Binsfeld Saint Paul, MN Member
- Sarah Holtzclaw Pleasanton, GA Member
- Daniel Leatham Shrewsbury, MA Member
- Conner McFarland Augusta, ME Member
- Danielle Roberts Charlotte, NC Member

**Visiting Member**

- Martha Lewis National Office TAP Chair
- Eugene Lillie National Office TAP Vice Chair

**Staff**

- Matthew O'Sullivan TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Annie Gold TAP Administrative Assistant
- James Bellinger Wage & Investment (W&I)

**Members of the Public**

None

**Quorum**

Quorum was not met.

**Welcome and DFO Report**

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided and the following DFO Report:

- Changes have been made with Staffing duties: Gilbert Martinez the Analyst for the Joint Committee is on a detail. Matthew O'Sullivan will be taking over as the Lead Analyst for the Joint Committee. Rosalind Matherne has agreed to cover as the Analyst leading the Internal Communications Committee while Matthew O'Sullivan has been temporarily assigned to the Lead Analyst over the Joint Committee. The assignments will last until November 30, 2022, the end of the TAP year
- Information from the Activity Reports is used for the Annual Report. It is made available to the public. Members were encouraged to take time to do their reports and add all their information to receive credit for their hours. Susan Jimerson is the Lead for the Annual Report
- The deadline to volunteer to be a part of the 2022 Annual Report Team is on October 13, 2022. Members in their first or second year are eligible to participate
- October 19, 2022, the Annual Report Committee will have their first meeting
- October 19, 2022, the Ad Hoc Chair meeting will begin at 2:30 PM, EDT
- October 20, 2022, the Outreach Committee will have their scheduled meeting beginning at 12:00 PM, EDT. Eugene Lillie is the Lead
- October 26, 2022, the ICC will have their meeting starting at 12:00 PM, EDT
- October 27, 2022, the Joint Committee will have their scheduled meeting beginning at 1:30 PM, EDT

### **National Office**

Terrie English could not be on the call today.

### **Chair Report**

Nina Tross shared the following:

- Thank you and appreciation expressed to members in their third year for their service, input, information, and time
- This is Tross' third year
- First and second year members were advised to watch for information on participating in the New Mentorship program
- Requests are submitted for third year members who have met the minimum required hours to receive a Presidential Volunteer Service Award. It comes with a certificate signed by the President along with a pin. The graduation date has not been determined
- Susan Jimerson is contact person over the Annual Report Committee. Volunteers are needed to assist in proof reading and reviewing for grammatical errors. A format has been determined. This is a way to obtain additional hours
- The committee has one referral to go to the Joint Committee on next week

### **Minutes Approval**

Members were asked to read over the September 08, 2022, minutes. Due to the lack of quorum the minutes will be carried to next month's Full Committee meeting.

### **Public Comment**

N/A

### **Program Owner's Report**

James Bellinger shared the following Program Owner's report:

- W&I is working diligently on all the referrals
- Expressions of appreciation and thank you to the Full Committee for their hard work being done

### **Subcommittee Report**

Subcommittee 1

Philip George stated Subcommittee 1 has completed their referral. They agreed and received all the feedback needed. They are now ready to present to the Full Committee for approval to move forward to the Joint Committee.

Subcommittee 2

Paula King stated Subcommittee 2 discussed and received their answers. They are ready to move forward with their issue.

### **Screening Committee**

O'Sullivan stated there was a technical issue that prevented members from reviewing the report last month. Members have had an opportunity to review but without quorum they cannot move forward.

### **Outreach**

Charlie Simineo shared the following:

- Getting the Activity Reports turned in has been stated and reiterated on the importance of getting the logs updated
- There are a few members who have not submitted their reports. It has been discussed with them
- Members were encouraged to use any conversations they may have about TAP is considered Outreach
- Eugene Lillie added when doing the Activity Reports, members are able to go back to December 2021 and fill in Activities done up to now. The edit feature is there to use if members need to add to their entries.
- Lillie has two Outreach events scheduled. One will be held in November and the other in December. Anthony Jackson will represent TAP in New Orleans in November. Erin Collins, National Taxpayer Advocate has asked for Jackson to introduce himself to her during the event.
- David Newingham will be accompanying Lillie in Las Vegas, in December

- Members were encouraged to keep track of time. It is considered Outreach
- Tross added she will continue to hand out the TAP SpeakUp Brochures
- O'Sullivan added he has been sending the reports with the breakdown to the Chair and Vice Chair. This month he will send to them and each member a copy with their hours

### **Internal Communications Committee (ICC)**

O'Sullivan shared the following:

- Tross volunteered to complete the Newsletter article for this month
- ICC is currently working on the improvement of the TAP Member Handbook
- They are pushing the new Facebook page. They have the new logo and the link that will go to the page. Members were encouraged to visit the page and share feedback
- Jimerson added ICC has good members who are skilled in that area. They are coming up with ideas and putting together a team to figure out how to do a better job to promote TAP and make the page more robust

### **Action Items**

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

- When responses are received from O'Sullivan will forward to members
- Check the database and work on the Screening Report
- O'Sullivan will not be able to attend the November meeting. Matherne will fill in for him.

### **Roundtable**

Tross asked for comments

- George and Simineo volunteered to assist on the Annual Report Committee
- Simineo shared he has been chosen to receive the AARP Volunteer Award for Wyoming. He will send Tross a copy of the information and a picture
- Jimerson stated the Staff is excited about the updates made to the new and improved [www.ImproveIRS.org](http://www.ImproveIRS.org) website in celebration of TAP Twenty-Year Anniversary. Members were given a preview on screen

Jimerson thanked everyone for being on the call and participating.

### **Closing**

Jimerson officially closed the meeting at 3:36 PM, EDT.

**Next Meeting: Thursday, November 10, 2022  
3:00 PM EDT, 2:00 PM CDT, 1:00 PM MDT, 12:00 PM PDT**

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