

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, November 9, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|---------------------|-------------------|-------------------------------------|
| • Anthony Earwood | San Antonio, TX | Member |
| • Debra Kurita | Fullerton, CA | Chair |
| • Eugene Lillie | West Deptford, NJ | National TAP
Chair & Member |
| • Angela Madison | Los Angeles, CA | National TAP Vice
Chair & Member |
| • Robin Mosley | Centerville, OH | Member |
| • Richard Rodriguez | Stockton, CA | Vice Chair |
| • Charles Slaney | Wilsonville, OR | Member |

Members Absent

- | | | |
|-------------------|----------------|--------|
| • Jon Ramirez | Maize, KS | Member |
| • April Smith | Birmingham, AL | Member |
| • Jantel VanOrden | Utah | Member |
| • George Williams | Ridgeland, MS | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Shawn Collins | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | W&I |

Quorum

A quorum was met.

Welcome

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

- November 15, 2023, Outreach will have their final meeting beginning at 11:00AM, EDT
- November 16, 2023, Joint Committee meeting will begin at 3:00PM, EDT
- November 21, 2023, Internal Communications Committee (ICC) monthly meeting beginning at 12:00 PM, EDT

- November 27, 2023, Joint Committee will have their final meeting beginning at 3:00PM, EDT
- November 28, 2023, TAP Retiring Members Graduation Ceremony will begin at 1:00PM, EDT
- Congratulations expressed to Eugene Lillie, April Smith and Jon Ramirez on their graduation. Appreciation to all three for their commitment and efforts to improve customer service

National Office Update

Shawn Collins expressed appreciation for the hard work of the Committee members over the TAP year. She also recognized the contributions of the third-year members who will be retiring from TAP. She noted that the success of TAP would not occur without the commitment the third-year members provide. Collins shared the following updates:

- Returning members were encouraged to consider becoming a leader during the 2024 TAP year by participating in the process for becoming the Chair or Vice Chair of a committee.
- November 28, 2023, the Graduation Ceremony will begin at 1:00PM EDT.
- The year-end survey will be shared with members near the end of November. Members were encouraged to participate in survey and share their feedback. This helps with making improvements to the processes and projects.
- Returning members were encouraged to continue conducting Outreach during the month of December and continue to spread the word about TAP
- Everyone was reminded to continue to enter hours on the Activity reports
- Members were encouraged to vote as the election process ends today. The results will be shared on November 13, 2023
- Work is being done on the Annual Report. Members with any contributions to share were encouraged to work with their Chair who will be creating the report

Chair Report

Debra Kurita shared the following:

- She noted that this meeting is the last one for the committee this year and expressed gratitude for the contributions from the members during the year.
- She recognized the retiring members - Lillie, Smith and Ramirez.
- Members were reminded that Activity Reports should include their time spend during this meeting. All words of wisdom should be sent to Kurita by the end of the workday on Monday, November 13, 2023
- The final Joint Committee meeting will be held on November 27, 2023. It will be open to the public
- A report on the progress of the updating of the Bylaws is expected to be on the agenda for the Joint Committee

- Members were encouraged to respond to the survey this year, as last year fewer than twenty members responded.

Minutes Approval

The TFPL October 12, 2023, Meeting Minutes were approved as submitted. Anthony Earwood motioned and George Williams seconded.

Public Comment

None

Subcommittee Report

Subcommittee 1

Angela Madison shared the following updates for Subcommittee 1: Issue #62577, TFPL Customer Service Survey was approved and received comments on Wednesday that need to be reviewed and discussed. This issue will be reviewed and discussed during the next TAP year.

Subcommittee 2

George Williams shared the following updates for Subcommittee 2: Subcommittee 2 met on Wednesday, November 08, 2023, and reviewed Issue #61907, Dashboard Data for Where is My Refund.

Earwood made the motion and Richard Rodriguez second to move the referral forward to the Joint Committee

Decision: Consensus to forward Issue #61907 to the Joint Committee

Outreach

Rodriguez stated the following updates for the Outreach Committee:

- Members were reminded to contact Matherne, Fred Smith and Kevin Brown for any supplies needed in performing Outreach
- Members were encouraged to submit ideas for items they may want to be included for next year.
- Members who may have items to be posted onto the Facebook page were encouraged to submit the request to Rebecca Lammers, Angela Madison and Rodriguez. They may call or email the information to be added and one of the members responsible for adding the posts will reach out to the submitter
- Madison added members should only call or text if it is an urgent issue meaning time sensitive within 48 hours or an inaccurate posting that needs to be corrected. Joseph Parampathu and Rodriguez are posting for November. Make sure to copy Lammers, Madison and Rodriguez on all emails
- Outreach has one meeting remaining on November 15, 2023

Internal Communications

Rodriguez stated ICC will have their final meeting on November 21, 2023

- Discussion on the suggestion process will be the topic for the meeting
- Responses will be documented and placed in the meeting notes for other committees having questions
- The referral was sent to the Outreach Committee about communicating more with the public about their meetings. Also having postings on www.ImproveIRS.org and using the distribution list managed by CSO.

Action Items

Matherne will do the following:

- Forward and post the approved TFPL October 12, 2023, reading minutes to Kevin Brown for posting
- Forward Issue #61907 to Holloway to be placed on the agenda for the Joint Committee's next meeting
- An email will be sent to members for their committee preferences in the upcoming year.
- Kurita added appreciation to Matherne for all her assistance throughout the year and to the members for their hard work and dedication

Roundtable

Kurita asked for suggestions and/or comments for the Roundtable:

- Williams expressed appreciation to the staff and members. He encouraged members to read the article he forwarded to Matherne
- Rodriguez shared information for the committee to work during next year
- Earwood expressed his appreciation working with the committee and he looks forward to next year
- Robin Mosley expressed appreciation to the staff and committee leadership. She looks forward to next year
- Charles Slaney expressed his appreciation, and he looks forward to year two
- Kurita expressed appreciation to all members for their efforts over the year. She encouraged members to attend the graduation, complete the year end survey, complete the Activity Report and send their words of wisdom for the Newsletter.

Jimerson thanked each member of the committee. She noted that outreach efforts should continue even though this year has ended. She stated that staff will continue to be available to assist if there is anything members need.

Close

Meeting was officially closed at 2:53 PM, EDT

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