Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 11, 2019

TAP Staff Present
- Rose A. Babb – Management Assistant, TAP
- Terrie English – Director, TAP
- Cedric Jeans – Designated Federal Official, (DFO)
- Fred Smith – Program Analyst

IRS Employees Present
- Debbie Awalt – Program Analyst, W&I
- Tamikio Bohler – Management and Program Analyst, W&I
- Gary Linsey – W&I Tax Analyst

Members Present
- Michael Gati – Laughlin, NV
- John Hughes – Memphis, TN
- Kimberly Mason – Chicago, IL
- Robert Moretti – Great Falls, MT
- Kristen Petersen – Colorado Springs, CO
- Laura Snyder – Paris, France
- Cheryl Williams – Shelton, WA

Members Absent
- Gina Gray – Nichols Hills, OK
- Tiffany Mosely – Santa Monica, CA
- Richard Russell – Owens Cross Roads, AL

Welcome/Opening
Jeans welcomed everyone and declared the meeting opened.

Roll Call
Babb conducted roll call. There were no public participants on the call. Quorum was met for this meeting.

Welcome/Announcements/Comments/Acknowledgement
Williams and Moretti welcomed the members to the first full committee call and proceeded with the agenda.

Approval of Minutes
The committee voted to approve the March Face to Face meeting minutes for posting to improveirs.org
English welcomed the members and stated the following:

- The recruitment season is currently open to the public from April 8, 2019 through May 3, 2019. Members and staff are asked to use their talking points during outreach in areas of low applicant turn out responses.

- Record keeping cards with a check sheet will be sent to members from the TAP mail box.

- The Joint Committee’s first teleconference is scheduled for April 25, 2019, 1:00 - 2:30 p.m. ET. The Joint committee is a combination of the chair and vice chairs of the full committees. New members are encouraged to join the call according to their schedules to see how the process works.

- Tax Forms and Publications will have its annual forum in 5 cities. Volunteers are asked to consider attending if they are in proximity of those locations; an email will be sent soon with the details. Members can be approved for 2 days attendance at the forum.

Jeans stated the following

- Members are reminded that to remain a panel member, they must continue to meet their tax obligation timely each year.

- Members will be receiving a Face to Face Meeting survey this week; this survey responses will help to improve the TAP program. The Survey will be open through April 19th, 2019.

- If you haven’t submitted your Travel voucher for processing; please do so.

- Members are asked to look at their Bio profiles in TAPSpace and ensure that it is up to date; this can be helpful beyond the TAP.

- There is News Release template that members will receive via email. This template can be used to send to news outlet. Members are asked to draft their news release and let Jeans and Fred review it.

**Outreach Report**

The outreach committee will meet on April 17th @ 3:00 p.m. ET. Moretti will have an outreach report next month. As of this meeting, 5 members sent in activity reports for outreach.

Williams mentioned that she is writing an article in the Enroll Agent journal; this article is due May 31. Williams asked the members if they would like to contribute to the article, they can reach out to her.
Subcommittee 1
Issue 36969 and Issue #37337 - The committee members agreed that both issues should be combined into 1 and address in the 1040 Instruction manual. Smith will prepare 1 referral.

Subcommittee 2
Issue #36785 – This referral was transferred to Taxpayer Communications Committee. Issue #36671- The subcommittee has requested additional information from the IRS.

Action Items
• Activity Reports are due on the 25th day of each month, any questions or assistance members can contact Moretti or Smith.
• Members will receive a template

Closing
Williams thanked everyone for joining the call; Jeans then proceeded to declare the meeting closed.

The next TFP full committee meeting will be on Wednesday, May 9, 2019, 11:00 a.m. ET.

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