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Description of document: Meeting minutes for meetings of the Internal Communications Committee (ICC) of the Internal Revenue Service (IRS) Taxpayer Advocacy Panel (TAP) 2015-2020

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**Department of the Treasury**  
**Internal Revenue Service**  
**Privacy, Governmental Liaison and Disclosure**  
**Centralized Processing Unit**  
Stop 93A  
PO Box 621506  
Atlanta, GA 30362

**Date:**  
August 7, 2020  
**Employee name:**  
Francisca Eyetsemitan  
**Employee ID number:**  
1000591343  
**Telephone number:**  
617-316-2271  
**Fax number:**  
855-205-9335  
**Case number:**  
2020-02424

This is a final response to your Freedom of Information Act (FOIA) request dated June 6, 2020, received in our office on June 8, 2020.

You asked for a copy of the meeting agenda and meeting minutes for each meeting of the INTERNAL COMMUNICATIONS COMMITTEE of the IRS Taxpayer Advocacy Panel, for meetings between 2014 and present.

We searched for and located 87 pages of documents responsive to your request. We're enclosing 87 pages in the enclosed protected CD. The password to open the files on the CD is being mailed separately. We're releasing 3 pages without exemptions and withholding 84 pages in part under FOIA exemptions (b)(6) and (b)(7)(E).

FOIA exemption (b)(6) exempts from disclosure files that would constitute an unwarranted invasion of personal privacy. We base the determination to withhold on balancing interests between the protection of an individual's right to privacy and the public's right to access government information.

FOIA exemption (b)(7)(E) exempts from disclosure records or information compiled for law enforcement purposes when their release would reveal:

- Techniques and procedures for law enforcement investigations or prosecutions.
- Guidelines for law enforcement investigations or prosecutions, if release could risk circumvention of the law.

If you would like to discuss our response, you have the right to contact the FOIA public liaison, Summer Sutherland, at (801) 620-2149.

The FOIA public liaison responds to FOIA and Privacy Act requests for copies of documents maintained by the IRS. There is no provision in either Act to resolve tax, collection, or processing issues. If you need assistance with tax-related issues, you can call the IRS at 800-829-1040.

You also have the right to contact the Office of Government Information Services (OGIS). The Office of Government Information Services, the Federal FOIA Ombudsman's office, offers mediation services to help resolve disputes between FOIA requesters and federal agencies. The contact information for OGIS is:

Office of Government Information Services  
National Archives and Records Administration  
8601 Adelphi Road--OGIS  
College Park, MD 20740-6001  
202-741-5770  
877-684-6448  
ogis@nara.gov  
ogis.archives.gov

You have the right to file an administrative appeal within 90 days from the date of this letter. By filing an appeal, you preserve your rights under FOIA and give the agency a chance to review and reconsider your request and the agency's decision. I've enclosed Notice 393, Information on an IRS Determination to Withhold Records Exempt From the Freedom of Information Act - 5 U.S.C. 552, to explain your appeal rights.

Your decision to contact the FOIA public liaison or OGIS for assistance resolving your dispute does not extend the 90-day period in which you can file an appeal.

If you have questions, you can contact the person at the telephone number at the top of this letter.

Sincerely,



David S. Nimmo  
Disclosure Manager  
Disclosure Office 13

Enclosures  
Responsive Documents/CD  
Notice 393

**Internal Communications Committee  
Monthly Meeting Minutes  
April 27, 2015**

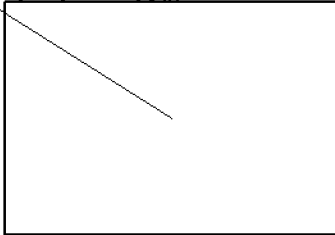
**Designated Federal Officer**

- Jeans, Cedric Memphis, TN

Designated Federal Officer

**Attendance – TAP Members**

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**Members Absent**

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**Staff**

- Cedric Jeans, TAP East Chief
- Janice Spinks, TAP Analyst
- Howard Brooks, Senior PA Specialist C&L
- Kevin Brown, TAP Secretary

**Roll Call**

Kevin Brown took roll.

**Opening/Welcome**

Janice welcomed everyone to the call and introduced Cedric Jeans as the DFO and Howard Brooks from Communications and Liaison (C&L) on the call.

**March Committee Meetings**

accepted the March minutes as presented.

**Chair Report**

N/A

**Current Issues to Address**

*TAP Brochure*- is work this issue and indicated that we need several more people to assist on this project since it would be needed to make this a successful project. agreed to assist on this project.

(b)(6) TAP Newsletter- (b)(6) reported that we now need to get the Joint Committee's (JC) input and OK so we can start putting issues out. (b)(6) mentioned that we need to have the completed report reviewed by the JC so that they can be sure the information is accurate and we can then send the newsletter out. (b)(6) would like to present the outline for the JC and give them until May 15, 2015 to approve the letter so we can be ready to publish by the end of this month.

(b)(6) TAP Pocket Guide- (b)(6) will delay this project until next month to give enough time to garner support by the committee on who is going to take the lead on this project. In addition, (b)(6) would like to ensure that the TAP brochure is complete before starting a new project like this. (b)(6) volunteered to take the lead on this project.

### **C&L SME Input**

Howard Brooks noted that www.improveirs.org was recently updated with C&L's assistance. This should be considered while updating the brochure and the pocket guide, according Brooks. Brooks recommended focusing on content first and seeing it displayed among other similar documents. In reference to the publication, Brooks suggested that the committee consider how it would look on a mobile device since many taxpayers are using these sorts of devices to view information now. White space will be necessary to ensure a comfortable viewing for our audience.

(b)(6) Janice requested guidance on the TAP pocket guide. (b)(6) asked for guidance for updating the Issue Submitter document also, which will be tabled until the TAP staff can weigh in on this. The colors other than red, white and blue will most likely be eliminated to get back to the TAP base colors. (b)(6) will supply clip arts and graphics to include the TAP logo and the TAS logo if necessary. This will be uploaded to www.tapSPACE.org when she acquires it. Brooks wanted the committee to ask if the website has the ability to capture an audience's attention making them want to find out more about TAP. This should be considered with all of the products and brochures also.

### **Reschedule May 25, 2015 Meeting**

(b)(6) indicated that the next meeting falls on the Memorial Day holiday and should be changed.

(b)(6) **Action Item: The next meeting will be May 18, 2015, same time.**

### **Next Steps**

(b)(6) mentioned that we will be following up with (b)(6) and (b)(6) regarding the newsletter and they will respond on the next meeting.

### **Closing**

Susan adjourned the meeting.

**Next Call: Monday, May 18, 2015**

**3:30 pm ET; 2:30 pm CT; 1:30 pm MT; 12:30 pm PT**



**Internal Communications Committee (ICC)**  
**Monthly Meeting Minutes**  
**Tuesday, April 24, 2018**

(b)(6)

**Members Present**

(b)(6)

**Members Absent**

**Designated Federal Officer**

- Susan Jimerson

Designated Federal Officer

## Staff

- Antoinette “Toni” Ross, TAP Analyst
- Cedric Jeans TAP East Chief
- Kudiratu Usman Analyst
- Matthew O’Sullivan Analyst
- Gilbert Martinez Analyst
- Rosalind Matherne Analyst
- Lisa Billups Senior Analyst
- Robert Rosalia Analyst
- Fred Smith Senior Analyst
- Priscilla Medrano SA Analyst
- Gregory Giles Analyst
- Kevin Brown TAP Administrative Assistant

## Opening/Welcome

Ross opened the call and welcomed everyone to the first ICC meeting of the year.

## Roll Call

Brown

(b)(6)

(b)(6)

**Chair Report**

(b)(6) recalled a great first meeting. Reminded the committee that we set a meeting date, committee chair and vice chair, the FB administrators and the entire committee.

(b)(6) encouraged members to go back to their committees and recommend each member join the TAP Facebook page.

(b)(6)

**April 24, 2018 Minutes**

(b)(6) second approved.

**Issue 37323- TAP Business Cards**

The committee went over several different examples of cards to determine which one would be the best option for the entire panel. Recommendations will be accepted by email before the next meeting. June 15, 2018 is the response date.

(b)(6)

**Newsletter**

(b)(6) twenty-fifth of each month is the date to get report to (b)(6) and (b)(6) to be added into the newsletter.

(b)(6)

**Facebook**

(b)(6) canvassed the committee to see who is signed up to the TAP Facebook account and offered assistance to members who may need help to set this up. (b)(6) will give a tutorial for the next meeting. The Taxpayer Advocacy Panel should be the search in Facebook in order to find the page. VITA or local United Way may be good options to do virtual outreach. (b)(6) encouraged LinkedIn is another option to use for virtual outreach.

(b)(6)

**Final Thoughts**

(b)(6) June 15, 2018 for cards. LinkedIn. Facebook for other committee members. (b)(6) encourages members to get sotries in sooner rather than later.

**Action Items**

**Closing**

Jimerson formally closed the meeting.

**Next Call: June 26, 2018,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**

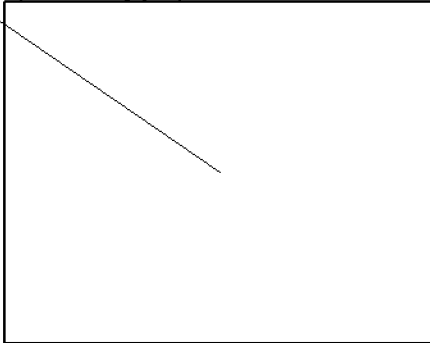
**Internal Communications Committee  
Monthly Meeting Minutes  
August 24, 2015**

(b)(6)  
**Designated Federal Officer**

- (b)(6) • [redacted] Seattle, WA Designated Federal Officer

(b)(6)  
**Attendance – TAP Members**

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(b)(6)  
**Members Absent**

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**Staff**

- Sheila Andrews, TAP Director
- Antoinette "Toni" Ross, TAP Analyst

**Roll Call**

Quorum met.

(b)(6)  
**Approval of June Minutes**

(b)(6)  
July minutes approved for posting.

(b)(6)  
**Opening/Welcome**

(b)(6) opened the meeting and introduced Toni Ross as the new program analyst for the committee replacing (b)(6). Sheila Andrews spoke about the Facebook account and who would take over after (b)(6) retires. A first or second year member will be selected and trained by (b)(6) but the administrator part has to be worked by the staff.

(b)(6)  
**Chair Report**

(b)(6) reported that at the face to face meeting the second week in January is the targeted date for the regional meetings for next year. If necessary sometime in March would be the alternate date. (b)(6) also reminded the committee that the referrals need to be done before the end of the TAP year. Mentors will be assigned to the new members starting next year also.



### **Status Reports Speak-Up Brochure and Pocket Guide**

(b)(6) reported that the Speak-Up brochure is in fairly decent condition with some changes being implemented by the JC meeting. Once these changes are made the brochure will be sent to legal for review. (b)(6)

(b)(6) The Pocket Guide was sent off for consideration and appears to be with C&L under review. Once it comes from C&L it will go to legal then to (b)(6) for publishing. Ross will follow up on the status and the next steps of this project. (b)(6)

### **August Newsletter**

(b)(6) (b)(6) indicated that the August newsletter, after review, is ready to be released.

(b)(6) (b)(6) was concerned that it did not have the visibility that we want it to have. (b)(6)

(b)(6) noted that the July newsletter was placed on the landing page of the [www.tapspace.org](http://www.tapspace.org).

(b)(6) inquired about including a collection of all newsletters so they could be reviewed by individuals returning to the website. (b)(6) noted that the previous newsletters are on [www.tapspace.org](http://www.tapspace.org) under the Internal Communications tab.

(b)(6) Past members can maintain access one the TAP Facebook page since they cannot access [www.tapspace.org](http://www.tapspace.org). (b)(6) indicated that a word limit should be placed or a reminder to the chairs to limit the amount submitted for the newsletter. Specific sections were discussed such as the national chair or the JC section to be all inclusive in each month's newsletter.

### **Toolkit Edits**

(b)(6) (b)(6) indicated that she needs about four more edits to completely review the document and complete this project. An option to put them somewhere for review is still being considered to simplify this process. The last two chapters have been assigned for someone to review them during this call. (b)(6)

### **Final Thoughts**

(b)(6) (b)(6) asks for suggestions for the committee that might be in other committees for projecting next year's projects to focus on. (b)(6) suggested an update to [www.tapspace.org](http://www.tapspace.org) while (b)(6) made it clear that this is budget driven and can be considered in the future. This is a large project that has to involve C&L so it will have to be resolved by the entire Panel. A survey by the Panel was suggested as a good started point for this project. (b)(6)

### **Closing**

(b)(6) thanked everyone who participated on the call. (b)(6) officially closed the meeting. (b)(6)

**Next Call: Monday, September 28, 2015**  
**3:30 pm ET; 2:30 pm CT; 1:30 pm MT; 12:30 pm PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
June 22, 2015**

(b)(6)  
**Designated Federal Officer**

- (b)(6) • [redacted] Washington, DC Acting Designated Federal Officer

(b)(6)  
**Attendance – TAP Members**

(b)(6)

[redacted]

(b)(6)  
**Members Absent**

- [redacted]

**Staff**

- Janice Spinks, TAP Analyst
- Kevin Brown, TAP Secretary

**Roll Call**

Kevin Brown took the roll, quorum was met.

(b)(6)  
**Approval of May Minutes**

The May minutes were approved with two minor corrections.

(b)(6)  
**Opening/Welcome**

[redacted] opened the call and the meeting.

(b)(6)  
**Chair Report**

N/A

(b)(6)  
**June Newsletter Issuance**

(b)(6)  
[redacted] reported that the May newsletter has already been distributed and the June newsletter is being finalized at this time. There are some formatting changes but the letter should be ready to go to the Joint Committee (JC) soon and will be issued monthly.  
(b)(6)  
[redacted] also indicated that an Outreach Corner would be included in the June newsletter.  
[redacted] reminded everyone that we are still trying to keep it to one page, which is why the formatting changes are needed to get everything on one page.

(b)(6)

**Status Reports Speak-Up Brochure and Pocket Guide** (b)(6)

(b)(6) reported that the latest version of the pocket guide was sent out about a week ago for the committee to review. We have received several grammatical corrections to be incorporated into the design. (b)(6) wanted to ensure that the wording fell in line with the TAP mission statement and include as close a number of members in the Panel as possible.

(b)(6) It was determined that referring to the style guide would be the best approach in how to present certain words such as federal advisory committee, panel or committee. Once these minor changes have been made (b)(6) will be forwarding this to Janice Spinks to be presented to the JC for their June meeting. (b)(6)

(b)(6) (b)(6) welcomed responses to the updates to the TAP brochure to make it a little cleaner and adding updated information. (b)(6) instructed anyone who has any changes, additions or corrections to be sent to Spinks to be forwarded to Butler.

(b)(6) (b)(6) suggested changing the first two bullets to make separate statements to keep things simple. (b)(6) suggested reviewing all four bullet points to further ensure they are completely separate statements or combine similar ones. The goal is to get out what the roll of TAP is for all who read it. (b)(6) mentioned to the committee that the IRS has graphic design experts, as well as other Subject Matter Experts (SMEs), available to assist with projects such as what this committee is currently working on.

(b)(6) (b)(6) stated that he is available for assistance as he has had a lot of experience working on these projects.

**Closing**

(b)(6) adjourned the meeting.

**Next Call: Monday, July 27, 2015**

**3:30 pm ET; 2:30 pm CT; 1:30 pm MT; 12:30 pm PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
Monday, November 23, 2015**

**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Attendance – TAP Members**

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**Members Absent**

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**Staff**

- Sheila Andrews, TAP Director
- Antoinette “Toni” Ross, TAP Analyst
- Kevin Brown, TAP Secretary

**Roll Call**

Quorum not met.

**Approval of September Minutes**

October minutes not approved since quorum was not met.

**Opening/Welcome**

Susan Jimerson opened the call and welcomed everyone to the call. Sheila Andrews thanked the entire committee for all of their work this year. Andrews reported that the face to face meetings are still planned for the second week in January, while many of the details are still being sorted out. The new member package is still in the approval process and preparations are being made to get the new members on board as soon as the package has been approved. The election results are still pending for next year’s TAP leadership.

### **Chair Report**

\_\_\_\_\_ welcomed everyone to the call and acknowledged how much this committee was able to accomplish this year and thanked everyone for their dedication as this committee adds on to other responsibilities.

### **Status Reports Speak-Up Brochure and Pocket Guide**

\_\_\_\_\_ mentioned the brochure was sent back to the Joint Committee (JC) for review. It has been reviewed by legal and will be viewed by the JC during the next meeting. The TAP Speak-Up Brochure may not be ready for the face to face meetings. It can and will be uploaded to the TAP toolkit for access by everyone once it has been finalized.

The pocket guide is currently with the publisher and should be ready for the face to face meeting according to Jimerson.

### **Newsletter**

\_\_\_\_\_ has taken over for the newsletter and was looked at to become the Facebook administrator. The change has not taken place just yet. This issue was discussed at length. \_\_\_\_\_ will follow up with \_\_\_\_\_ to find out the status of this.

### **Toolkit Edits**

\_\_\_\_\_ reported that the success stories are still being worked on. The TAC committee "Hate to Wait" document will be uploaded to the TAP Toolkit. The document was approved by the JC so it can be uploaded. \_\_\_\_\_ questioned what can be done to ensure that the updated version of the TAP Toolkit to be sure the right one is available online.

**Action Item:** Susan Jimerson will communicate with Kim Vinci to update the TAP Outreach Toolkit correct version on the TAPSpace website.

### **Final Thoughts**

\_\_\_\_\_ indicated that the "Hate to Wait" document should be added to the TAP Toolkit since it has been approved.

### **Closing**

\_\_\_\_\_ thanked everyone who participated on the call. \_\_\_\_\_ expressed her appreciation for the time and work that each member dedicated for all of the projects done this year. Jimerson expressed her appreciation with all of the accomplishments for this committee especially update the TAP Speak Up brochure, which was 10 years old. Jimerson was equally pleased to update many other projects that needed to be updated. Jimerson officially closed the meeting.

**Next Call: TBD**

**Internal Communications Committee  
Monthly Meeting Minutes  
Monday, October 26, 2015**

(b)(6)  
**Designated Federal Officer**

- (b)(6) • [redacted] Seattle, WA Designated Federal Officer

(b)(6)  
**Attendance – TAP Members**

- (b)(6) • [redacted]  
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(b)(6)  
**Members Absent**

- [redacted]  
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**Staff**

- Sheila Andrews, TAP Director
- Antoinette "Toni" Ross, TAP Analyst
- Kevin Brown, TAP Secretary

**Roll Call**

Quorum met.

**Approval of September Minutes**

September minutes approved for posting.

**Opening/Welcome**

(b)(6) Jimerson opened the call and indicated that this might be the last meeting for the year if we are able to get everything wrapped up today.

(b)(6)  
**Chair Report**

[redacted] and welcomed everyone to what is expected to be a busy call.

**Status Reports Speak-Up Brochure and Pocket Guide**

[redacted] mentioned the brochure was not sent to the Joint Committee (JC) for review and the next meeting. Jimerson mentioned the inclusion of the success stories may have been the reason for the delay. If this is ok then the brochure can go through the final legal review and then to the Joint Committee.

**Action Item:** Consensus not to include the success stories in Speak-Up brochure.

(b)(6) [redacted] inquired about what happens to the pocket guide once it has been approved by the JC and was told it would be posted on to the www.improveirs.gov site.

### **Newsletter**

(b)(6) [redacted] reported that she should have her part of the newsletter finished by tomorrow. Both (b)(6) [redacted] and (b)(6) [redacted] are still working together to get the technical requirements taken care of to be sure (b)(6) [redacted] has everything needed to complete the newsletter. Microsoft Publisher software is required in order to complete this task and (b)(6) [redacted] now has this program.

### **Toolkit Edits**

(b)(6) [redacted] indicated that the JC did not receive the link to the toolkit documents so they can review them. The TAP success stories have yet to be received and therefore have not been completed. Once they are received, this portion can be updated. Chapter 11 has quite a bit of work that needs to be done so (b)(6) [redacted] and (b)(6) [redacted] discussed ways this review could be done and made easier.

(b)(6) [redacted] Jimerson indicated that focusing on how we want the success stories to look would perhaps make it easier for us to get them from the committees and provide it in the toolkit. (b)(6) [redacted] suggested that a smaller amount of information to identify the issue and its date would be enough information to give in this section. Jimerson suggested Ross pull a list of the accepted recommendations for each committee so that this committee can review and discuss them. The committee would then determine what would be used in the success stories for each committee.

(b)(6) [redacted] **Action Item:** Ross will get a list of accepted recommendations from the other committees for this committee to review.

### **Final Thoughts**

(b)(6) [redacted] asked everyone to keep the last meeting date open in case it was needed, but a decision will be made closer to the date.

(b)(6) [redacted] **Action Item:** Ross will send the link for the Outreach Toolkit to the Joint Committee.

### **Closing**

(b)(6) [redacted] thanked everyone who participated on the call. Jimerson officially closed the meeting.

**Next Call: Monday, November 23, 2015**  
**3:30 pm ET; 2:30 pm CT; 1:30 pm MT; 12:30 pm PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
September 28, 2015**

**Designated Federal Officer**

- Susan Jimerson      Seattle, WA      Designated Federal Officer

**Attendance – TAP Members**

(b)(6)

(b)(6)

**Members Absent**

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**Staff**

- Sheila Andrews, TAP Director
- Antoinette "Toni" Ross, TAP Analyst

**Roll Call**

Quorum met.

**Approval of June Minutes**

August minutes approved for posting.

**Opening/Welcome**

Jimerson proposed that a current member of the internal communications committee cover the newsletters for the December and January months to keep it going while the new TAP year gets started. This would allow some information to be disseminated to TAP during this transition period.

**Chair Report**

(b)(6) and welcomed everyone to what is expected to be a busy call.

**Status Reports Speak-Up Brochure and Pocket Guide**

Toni Ross will get an update and report back to the committee as quickly as she can.



**Newsletter**

(b)(6) reported that it is two full pages and will be ready once the committee is done with its review. Jimerson inquired what would happen when (b)(6) and (b)(6) retires next month.

(b)(6) It was determined that someone currently on the Internal Communication committee would assume this responsibility while the TAP committees are in transition and being formed. (b)(6) has volunteered to take this over during the December 2015 and January 2016 months until the new committee is formed.

**Toolkit Edits**

(b)(6) indicated that most of the edits were minor and allowed the document to flow better.

- The edits to the News Release were accepted with minor corrections.
- In the Letter to the Editor, all of the suggested edits have been accepted.
- The TAP Monthly Conference Call document edits were accepted with a small discussion about the total number of members since the numbers may change throughout the year. A suggestion was made to add a version date to ensure the revisions are visible and make it easier to know when changes have been made.
- In the TAP Talking Points document, a discussion occurred about the time required for TAP activities possibly being misleading. Jimerson indicated that the bare minimum is supported by this estimation, while the time commitment will go up as your involvement increases. This should be explained at the new member orientation process to be sure there is a clear understanding per Jimerson, (b)(6) and (b)(6). All other edits accepted.
- The "Working a Booth" document edits were all accepted.
- The Media Offices edits were accepted.
- The Facebook section edits were accepted with minor corrections.
- The Additional Resources links document had minor corrections. The Milwaukee information was removed to avoid confusion since the TAP East and West offices are where issues are to be sent.

**Final Thoughts**

(b)(6) Ross will provide all of the action items with the edits of the sections very soon. The JC will review the Speak Up brochure before it goes to publishing for a review, not to include any changes. Jimerson indicated that the success stories are a priority and should be added as soon as possible. Jimerson wants this to be sent out within the week. Ross will send it to the members by Wednesday.

**Closing**

(b)(6) thanked everyone who participated on the call. Jimerson officially closed the meeting.

**Next Call: Monday, October 26, 2015**  
**3:30 pm ET; 2:30 pm CT; 1:30 pm MT; 12:30 pm PT**

**Internal Communications Committee(ICC)  
Monthly Meeting Minutes  
Tuesday, April 24, 2018**

(b)(6)

**Members Present**

(b)(6)

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**Members Absent**

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**Designated Federal Officer**

- Susan Jimerson
- Designated Federal Officer

**Staff**

- Antoinette "Toni" Ross, TAP Analyst
- Cedric Jeans TAP East Chief
- Kudiratu Usman Analyst
- Matthew O'Sullivan Analyst
- Gilbert Martinez Analyst
- Rosalind Matherne Analyst
- Lisa Billups Senior Analyst
- Robert Rosalia Analyst
- Fred Smith Senior Analyst
- Priscilla Medrano SA Analyst
- Gregory Giles Analyst

**Opening/Welcome**

Ross opened the call and welcomed everyone to the first ICC meeting of the year.

**Roll Call**

(b)(6)  
Brown

**Elect an ICC Chair and Vice Chair**

- Chair

- [redacted] Vice Chair

**Set Meeting Schedule and Time**

Fourth Tuesday each month at 2:00pm ET.

**Volunteers for Facebook Administrator**

[redacted] and [redacted]

**Volunteers for TAP Newsletter**

[redacted]

**Final Thoughts**

Howe suggested the committee read the Continuation Manual to get familiar with what the committee does. [redacted] is looking forward to having a good year and improving the Facebook page for the committee.

**Action Items**

- Update TAP calendar with ICC meeting dates- Fourth Tuesday of the month at 2:00 p.m. ET
- Send email to absent members soliciting for volunteers for the TAP Newsletter

**Closing**

Jimerson formally closed the meeting.

**Next Call: May 22, 2018,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
Tuesday, May 9, 2017**

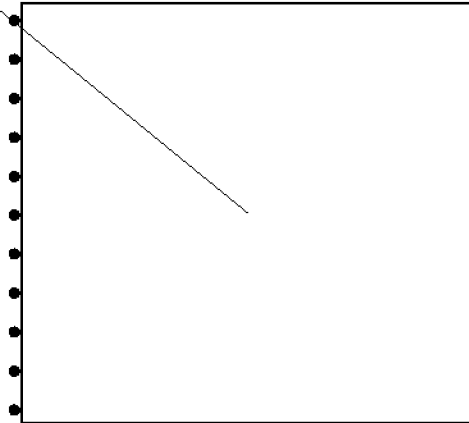
**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Members Present**

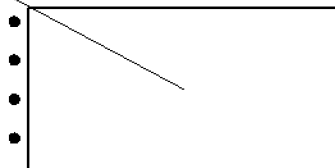
(b)(6)

(b)(6)



**Members Absent**

(b)(6)



**Staff**

- Javier Hernandez
- Gilbert Martinez, TAP Analyst
- Robert Rosalia
- Otis Simpson
- Antoinette Ross
- Priscilla Medrano
- Kevin Brown

**Welcome/Open Meeting**

Susan Jimerson opened the call and welcomed everyone to the committee's first meeting of the year.

**Roll Call**

Kevin Brown

### **Review Agenda**

Jimerson reviewed the agenda and explained what the committee will do during the year. Jimerson introduced Gilbert Martinez as the committee analyst for the year.

### **Elect new Chair and Vice Chair**

Martinez welcomed everyone to the call and opened the nomination process for committee Chair and Vice-Chair. [redacted] self-nominated for the committee Chair. [redacted] self-nominated for the committee Vice-Chair. [redacted] motioned to approve the nomination [redacted] seconded and there were no objections.

### **Action Item:**

- [redacted] Chair
- [redacted] Vice-Chair

### **Establish monthly meeting dates and times**

The meeting date is proposed for 2:30pm ET on the second Tuesday of the month. [redacted] motioned, [redacted] seconded no objections.

**Action Item:** Second Tuesday at 2:30pm ET

### **Project Topics**

#### **Identify Projects**

[redacted] suggested a section to recognize monthly outreach in the newsletter such as a Spot Light section. This could give members ideas about how to complete research. [redacted] agrees that this might help new members learn how to conduct outreach for the Panel.

### **Newsletter – Form Sub-Committee**

[redacted] and [redacted] will be in charge of preparing the newsletter each month. Information is due on the fifth of each month and finished between the tenth or the fifteenth of each month. Jimerson explained the entire process of how the newsletter is generated and disseminated to the Panel. The first newsletter will be completed for June 2017.

### **Facebook – select primary and back up administrators**

[redacted] will be the primary and [redacted] secondary administrators for the TAP social media account. Jimerson will provide them with the access information.

### **Social media**

[redacted] Add newsletter to social media feeds. Be sure the message is consistent throughout and getting the TAP link on local library websites.

### **Final thoughts**

[redacted] suggested that we first check our website [www.improveirs.org](http://www.improveirs.org) and ensure that there is consistency in the message. [redacted] also suggested that we use only the most effective social media method to get TAP's message out to the public.

(b)(6) Business cards should be used during our outreach. (b)(6) continued with getting the TAP link on local library websites.

(b)(6) discussed sharing pieces that the IRS is already distributing via Quick Alerts and other methods so that there isn't worry about needing to respond or worry of inaccurately representing information.

**Action items**

- (b)(6) Committee Chair.
- (b)(6) – Committee Vice-Chair.
- Meetings will be the second Tuesday at 2:30pm ET.
- Social Media will be continued on the next meeting.

**Closing**

Jimerson and Martinez thanked everyone and closed the called.

**Next Call: Tuesday, June 13, 2017,  
at 2:30pm ET, 1:30pm CT, 12:30 pm MT, 11:30am PT**



**Internal Communications Committee  
Monthly Meeting Minutes  
Monday, May 23, 2016**

(b)(6) **Designated Federal Officer**  
• Susan Jimerson    Seattle, WA    Designated Federal Officer

**Attendance – TAP Members**

(b)(6) [Redacted list of TAP Members]

**Members Absent**

(b)(6) [Redacted list of Members Absent]

**Staff**

(b)(6) [Redacted]  
• Lisa Billups, TAP Senior Analyst  
• Antoinette "Toni" Ross, TAP Analyst  
• Kevin Brown, TAP Secretary

**Opening/Welcome**

(b)(6) Lisa Billups opened the call, welcomed the members and recognized (b)(6) as the committee Chair and (b)(6) as the committee Vice-Chair.

(b)(6) [Redacted block of text]

**Establish monthly meeting dates and times**

(b)(6) This issue will be carried forward to next month's meeting. Members will email suggestions to (b)(6) to assist in this effort prior to the next meeting.

**Approval of October and November Minutes**

N/A

### Newsletter

(b)(6) reported that the May newsletter was put out thanks to (b)(6) and Lisa Billups. Halleman indicated that the committee will notify the Joint Committee that each committee will need to submit their report on the first Friday of every month so that they can be included in the newsletter.

(b)(6) The hope is to take about three or four days and put it out between the fifth, sixth or seventh day of each month. We will try to streamline the submission format so the newsletter is easily put together and shared with the Panel. The staff and Panel members are happy with the new format for the newsletter.

### Facebook

(b)(6) Billups reported that (b)(6) will become the new Facebook administrators.

### Outreach Toolkit

(b)(6) Chapter 11, Success Stories, had several suggestions discussed. In the past recommendations that were accepted by the IRS were included, but this committee can make decisions on what direction we go in for this topic. (b)(6) posed two questions: How does it serve second and third year members? What is different about it for first year members? The purpose of this is to make the toolkit accessible and usable for everyone.

(b)(6) proposed three different topics for new members, returning members and success stories. (b)(6) questions how to update the Outreach Toolkit on TAPspace to make it easier to be used by the Panel members.

### Final Thoughts

Questions came up regarding the committee's responsibility for the Annual Report. Billups will have clarity on this issue for the next meeting.

### Action Items

- (b)(6) Selecting the committee dates and times will be done the next meeting.
- (b)(6) Resolution will be sought regarding the Annual Report coming back to this committee next meeting.
- (b)(6) (b)(6) will be the new Facebook administrators upon consultation with (b)(6)
- (b)(6) A meeting will be set with the Outreach Toolkit committee.

### Closing

Billups formally closed the meeting.

Next Call: June 20, 2016,  
at 1:00pm ET, 12:00pm CT, 11:00am MT, 10:00am PT



**Internal Communications Committee  
Monthly Meeting Minutes  
Monday, July 19, 2016**

**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Attendance – TAP Members**

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

**Members Absent**

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

**Staff**

- Lisa Billups, TAP Senior Analyst
- Sheila Andrews, Director

**Opening/Welcome**

Lisa Billups opened the call, welcomed the members, and expressed appreciation for the number of ICC members able to attend on short notice of the change in meeting date.

**Chair Report**

[REDACTED] informed the committee that the new Facebook Administrators [REDACTED] and [REDACTED] will be meeting with Suze to transition this role from Suze [REDACTED] to [REDACTED] and [REDACTED]. Dan stressed the importance of embracing Facebook as one of the ways we can share information about TAP as we move forward with adding a virtual outreach component to our current outreach strategies. A meeting with the Outreach toolkit committee is also being planned; any member interested in joining [REDACTED] and [REDACTED] in this effort is welcomed.

**Monthly meeting dates and times**

The monthly meeting date has changed. The monthly ICC meeting is the third Tuesday of every month at 2:00p.m. ET.

### **Review of May minutes**

There were no changes to the May minutes. There was no June meeting.

### **Newsletter**

There was much discussion about the TAP newsletter. The Newsletter committee is having difficulty receiving timely submissions for the newsletter; the goal is to have the newsletter published by the tenth day of each month. The committee list the below as some of the problems facing the committee:

- Lack of timely article submissions
- Monthly reminders do not seem to work
- Managers having to add content where lacking
- Content is a problem
- Lack of clarity as to the intent of the newsletter
- Concern that newsletter is becoming a status report of issue progression

Also discussed is the content of the articles and whether what is being reported is of interest to the audience. A discussion was held as to who the audience should be (Alternates and Members or for use in outreach to the community, etc.) Depending on the desired audience the content may need to be tweaked. It was discussed possibly sending a survey to the TAP members to get their thoughts on the newsletter, it was decided a survey usually does not result in sufficient feedback and as an alternative each ICC member should meet with their respective committees and solicit feedback regarding the future direction of the newsletter and bring the responses back to the ICC at the next meeting. It was suggested we consider opening the newsletter submission to the general membership if a particular member has an article they would like to submit to the newsletter committee, it was also discussed each project committee can designate someone on the committee to write the committee report on behalf of the committee.

### **Facebook**

Billups reported [REDACTED] are the new Facebook administrators and will meet with the prior administrator.

### **Outreach Toolkit**

Lisa indicated a meeting will be scheduled with the outreach toolkit committee and opened it up to anyone on the ICC who is interested in participating.

### **Final Thoughts**

The Annual Report responsibility will not return to the ICC. [REDACTED] will oversee this process. Anyone interested in assisting is welcomed.

### **Action Items**

Lisa will provide a summary of the newsletter discussion points for the upcoming meetings to be held with the ICC member's respective committees to help determine the future direction of the TAP newsletter.

Meetings will be scheduled for the Facebook and Outreach Toolkit committees

New meeting invite for the remainder of the year will be sent

### **Closing**

Billups formally closed the meeting.

**Next Call: August 16, 2016,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
Tuesday, August 16, 2016**

**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Attendance – TAP Members**

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

**Members Absent**

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

**Staff**

- Lisa Billups, TAP Senior Analyst

**Opening/Welcome**

Susan Jimerson opened the call, welcomed the members, and indicated that this will be a short meeting because the Joint Committee call is next. Jimerson reviewed the agenda referred to [REDACTED] for the Chair report.

**Chair Report**

[REDACTED] mentioned there were some scheduling issues that we had to work on the last few months. [REDACTED] also indicated that the Member Handbook committee will be on Friday this week to revise two chapters.

**Monthly meeting dates and times**

We have to work on the time conflict for next month's meeting in September.

**Action Item:** The next meeting will be Wednesday, September 7, 2016 at 1:00pm Eastern Time.

**Review of May minutes**

The July minutes were accepted with no changes.

**Newsletter**

(b)(6) reported that we are still having problems getting reports for the newsletter delaying it being sent out. Changes in the format were suggested regarding making the Outreach Report the Vice-Chair's responsibility.

**Action:** Billups will provide this suggestion to the TAP National Vice-Chair and see what her response would be.

(b)(6) The committee found the newsletter important, informative and necessary since it allows members to share what other committees are doing as well as different ways to perform outreach. This was thought to be very helpful to the entire TAP staff.

(b)(6) suggested a TAP member Hall of Fame as a way to get more quality in our outreach reports. (b)(6) felt that the format should remain consistent as it appears quite affective at this time. (b)(6) suggested leaving a blank space for committees who do not submit reports or using that space for something else. (b)(6) was recognized for adding an editorial to last month's newsletter as a way to fill the space left by a missing committee's reports.

(b)(6) indicated that the summary for the newsletter can be completed by any committee member if the committee Chair cannot do it. Halleman will bring these suggested changes to the Joint Committee meeting later today.

**Facebook**

(b)(6) reported that we are trying to schedule meeting with (b)(6) ext (b)(6) Monday to change the Facebook account over to (b)(6) Ju and (b)(6)

**Closing**

(b)(6) formally closed the meeting.

**Next Call: September 7, 2016,  
at 2:00pm ET, 12:00pm CT, 11:00 am MT, 10:00am PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
Wednesday, September 7, 2016**

**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Members Present**

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**Members Absent**

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**Staff**

- Lisa Billups, TAP Senior Analyst

**Opening/Welcome**

Susan Jimerson opened the call, reviewed the agenda and welcomed everyone to the call.

**Chair Report**

welcomed everyone to the call and thanked them for their time.  
 indicated that we are still working on the Administrator rights for the Facebook account and indicated that we may not be able to get it done until the end of the year.

**Review of May minutes**

The minutes will be reviewed in October

**Newsletter**

reported that the new format was received well by the Joint Committee and that we will still hold the Chairs responsible for monthly submissions for the report.

Susan Jimerson spoke discussed whether all of the submissions for the September newsletter had been received. After a discussion about the Outreach Report, the committee will use the current Outreach Report for the Newsletter. reported that we are trying to have the newsletter completed by Friday, September 9, 2016.

(b)(6)

**Outreach Toolkit**

(b)(6) and (b)(6) reported that they have been working on a template for chapter 11 that needs to be reviewed by the committee in hopes of being more user-friendly for outreach. Lisa Billups reported that the title is looking to be changed to Successful TAP recommendations or something similar to reflect what is current has in it. There are still questions about how many stories will be included and letting the committees select the ones to be included in this section.

(b)(6) indicated this section will be used by TAP members in outreach presentations so the committees know what the purpose of this section is.

(b)(6) **Action Item:** The template for Chapter 11 will be sent to the committee by email from Lisa Billups and comments are welcomed from all prior to next month's meeting.

**Final Thoughts**

(b)(6) indicated that the goal is for this to be available for the 2017 TAP Member Handbook. In addition, date specific accomplishments will not be the focus allowing for the section to be used for a longer period of time, according to (b)(6).

**Action Item:** Billups indicated that the newsletter will be distributed via email.

**Closing**

Jimerson formally closed the meeting.

**Next Call: October 18, 2016,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**

**Internal Communications Committee  
Monthly Meeting Minutes  
Wednesday, October 18, 2016**

**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Members Present**

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**Members Absent**

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**Staff**

- Lisa Billups, TAP Senior Analyst

**Opening/Welcome**

Jimerson opened the call and reviewed the agenda.

**Chair Report**

reported that the committee is still pursuing the Outreach Toolkit primarily Chapter 11. continued that we are getting down to the wire would like to see if we could have a recommendation for the October Joint Committee (JC) meeting for the Outreach Toolkit.

**Review of May minutes**

The August and September minutes were approved as submitted.

**Newsletter**

mentioned the Newsletter was successful thanks to Lisa Billups with report with the outreach numbers recommended keeping the same format including the number from the Outreach Report in the Newsletter. Ogden raised an issue of members not completing their reports and how important they are for the Outreach Report to TAP's overall mission. echoed the importance of this information as it substantiates the existence of TAP. will emphasize this during the next JC meeting. also indicated that it is not too late to update the



(b)(6) Outreach Reports and members should take the time to complete this. (b)(6) mentioned that the report looks very nice and she love the outreach chart.

(b)(6) (b)(6) mentioned the importance of reporting outreach may not have been made clear to prospective members and Ogden added that this should be stressed to get full participation from the new members. Ogden recognized (b)(6) for his unique approach to outreach. (b)(6) efforts may an example for the Outreach Toolkit.

### **Outreach Toolkit**

(b)(6) (b)(6) indicated that the toolkit should be reviewed at the beginning of each TAP year. Ogden argued that members should be allowed to put stuff directly on [www.TAPSpace.org](http://www.TAPSpace.org) instead of so many barriers being in the way. (b)(6) said they released the template for Chapter 11 in September to get feedback possibly getting a success story to add to it. (b)(6) mentioned that the successes could even be completing a task given by the IRS like reviewing a document, template or portion of the website.

### **Final Thoughts**

(b)(6) (b)(6) mentioned he started a Twitter account for TAP and requested feedback from the committee regarding this project. (b)(6) indicated that we still have been able to get the Facebook administrator transferred from (b)(6). Alternatively, Ogden brought up the Nextdoor site as an additional social media option for TAP.

(b)(6) (b)(6) The committee discussed the importance of having a current social media presence to keep up with the times. (b)(6) suggested that the owner be a permanent staff member to avoid this issue in the future. (b)(6) indicated that this is against IRS policies and procedures. Jimerson added that it might be time to start a completely new Facebook account in light of all of the issues we are having transferring the administrator rights.

Jimerson suggested that the administrator should be something passed to the TAP Chair to make it a simple or easier process. If that does not work, the transfer should be done before the TAP year ends to a first or second year member to avoid this in the future for any social media account the committee has. It was also suggested that the accounts be associated with one email and be transferred through the TAP Chair, Committee Chair or a first or second year member.

Jimerson inquired about possible newsletter for December and January for the next meeting. Jimerson indicated that the current Newsletter was great and gave kudos to those who prepared it. Jimerson is following up on why the Speak Up brochure has not been printed yet. Jimerson also welcomed future projects for ICC next year.

### **Closing**

Jimerson formally closed the meeting.

**Next Call: November 15, 2016,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee  
Tuesday, October 23, 2018**

(b)(6)

**TAP Members**

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[Redacted]

**Absent Members**

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[Redacted]

**TAP Staff**

- Lisa Billups - Designated Federal Official (DFO) Acting
- Antoinette "Toni" Ross – Program Analyst
- Kevin Brown – Management Assistant
- Otis Simpson – Program Analyst
- Gregory Giles – Program Analyst
- Tyra Lindsey – Program Analyst
- Rosalind Matherne – Program Analyst
- Matthew O'Sullivan – Program Analyst
- Tracy Rohrs– Program Analyst

**Welcome/Opening**

Jimerson opened the call and welcomed the committee and thanked everyone for the work they have done this year. Jimerson reported [Redacted] will be leaving the committee very soon and thanked him for all he has done during his career with TAP.

(b)(6)

**Roll Call**

Brown completed roll call.

**Chair Report**

[Redacted] reported being sad to leave TAP but being happy with his time with TAP.

**Approve September 25, 2018 Minutes**

(b)(6) Minutes approved as submitted.

**Newsletter**

(b)(6) reported being ready by the end of the month of September by October 31, 2018. (b)(6) spoke about continuing the Newsletter off months just like it was done last year.

**Facebook**

(b)(6) Ross reported the need to replace Sheila Olsen who is retiring this year. (b)(6) will solicit via the Newsletter for a replacement Administrator for the TAP Facebook page. Ross suggested two Administrators and one backup for the Facebook page.

**Approve TAP Referral 37323-TAP- Business Cards**

(b)(6) reported that this referral will be reviewed and hopefully approved by the Joint Committee on October 25, 2018. (b)(6) will not be attending this meeting, (b)(6) will be representing the ICC during this meeting.

**Final Thoughts**

- (b)(6) reminded the committee that the Activity Reports are due by October 25, 2018.
- Ross reminded the committee that the newsletter articles are due by October 26, 2018.
- (b)(6) thanked (b)(6) for stepping in for him on this committee.
- All activity reports for this year go up to November 30, 2018 for this year.
- Third year members may have to estimate their time and reported it before November 30, 2018.

(b)(6) Ross thanked (b)(6) for stepping up and reminded her that she is her to assist for this committee.

**Closing**

(b)(6) Jimerson thanked (b)(6) for his service and (b)(6) for stepping I for (b)(6) Jimerson officially closed the call.

**The next Internal Communications Committee meeting is on  
November 27, 2018 at 2:00 PM EST**

**Internal Communications Committee  
Monthly Meeting Minutes  
Wednesday, November 15, 2016**

**Designated Federal Officer**

- Susan Jimerson     Seattle, WA     Designated Federal Officer

**Members Present**

[Redacted box for Members Present]

**Members Absent**

[Redacted box for Members Absent]

**Staff**

- Matthew O' Sullivan, TAP Analyst

**Opening/Welcome**

[Redacted] opened the call and reviewed the agenda. [Redacted] introduced Matthew O' Sullivan from Oakland California as the new analyst for this committee.

**Chair Report**

[Redacted] reported that he presented Outreach Toolkit Chapter 11 to the Joint Committee (JC) during the October JC meeting.

**Review of May minutes**

October minutes approval will be tabled until the next meeting.

**Newsletter**

[Redacted] reported that he would credit [Redacted] and [Redacted] for the newsletter on the next JC meeting. [Redacted] asked that members please forward any additional success stories to [Redacted]. [Redacted] explained that successes could be all of what TAP represents and not just the recommendations that are accepted by the IRS. These can be shared even if the issue has not been fully accepted. Ogden spoke about [Redacted]' outreach efforts and how he might be able to either work on this for the Outreach Committee or assist those who are in charge of this project.

(b)(6) thanked (b)(6) for all of his efforts and his leadership as he has been much more than just a leader to this committee and TAP. Halleman thanked the committee and the entire TAP Panel. Ogden thanked (b)(6) for all of his service to this committee and to TAP. (b)(6) will work with the staff to put together a newsletter over the November and December time frame.

### **Outreach Toolkit**

There was some discussion as to whether the JC had to approve these changes since this is not a committee under FACA guidelines. The committee determined that there is no need for JC approval for the changes being made to the Outreach Toolkit.

### **Final Thoughts**

Susan Jimerson and Sheila Andrews thanked (b)(6) and the entire committee for all they have done for the Internal Communications Committee.

### **Closing**

Jimerson formally closed the meeting.

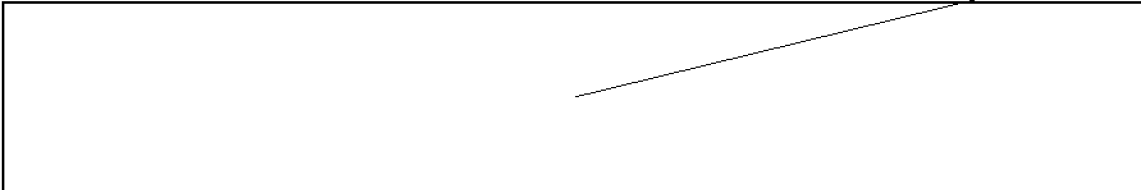
**Next Call: TBD**

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee  
Tuesday, November 27, 2018**

(b)(6)

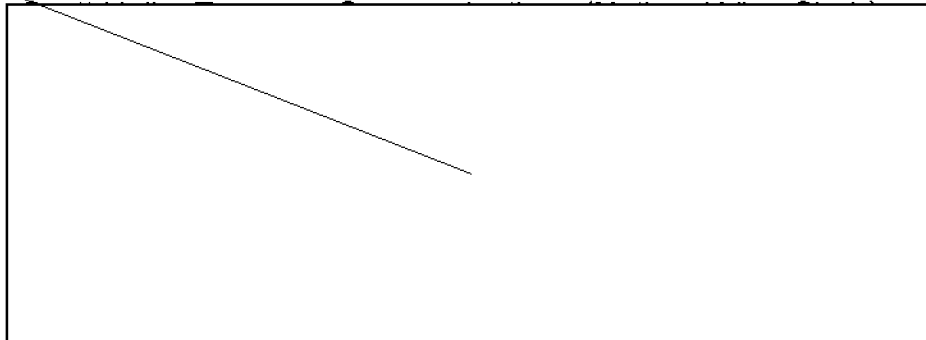
**TAP Members**

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**Absent Members**

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**TAP Staff**

- Kevin Brown – Management Assistant
- Terrie English – TAP Director
- Cedric Jeans – TAP East Chief
- Matthew O’Sullivan - Designated Federal Official (DFO) Acting
- Gilbert Martinez – Program Analyst
- Rosalind Matherne – Program Analyst
- Antoinette “Toni” Ross – Program Analyst
- Otis Simpson – Program Analyst
- Rosalind Matherne – Program Analyst

**Welcome/Opening**

Matthew O’Sullivan opened the call, thanked the members for their effort for the year.

**Roll Call**

Brown took roll.

**Chair Report**

welcomed the committee and reviewed the agenda.

**Approve October 23, 2018 Minutes**

Minutes approved as submitted.

(b)(6)  
(b)(6)

### **Newsletter**

(b)(6) reminded the committee that the monthly reports for the newsletter are due. (b)(6) also indicated that the activity reports will be used for the December Newsletter.

(b)(6)

### **Facebook – Seeking Volunteers as Admins**

(b)(6) made a solicitation for volunteers to be Facebook administrators for next TAP year. Ross will send an email message soliciting volunteers from the returning members soon.

### **TAP Referral: Issue 37323 – TAP Business Cards**

Example number three was selected by the committee.

### **Projects for TAP Year 2019**

(b)(6) The committee will have to wait for the rebranding issue to go through the approval process which includes the National Taxpayer Advocate; TAP leadership; and then the Joint Committee.

### **Final Thoughts**

(b)(6) thanked Ross and Brown along with the entire staff for all they have done throughout the year to help the committee stay on track. Date of December 1, 2018 is the date we are pushing for. Ross and (b)(6) will work together on the newsletter.

Suggestions and helpful information for the incoming members will be part of the December Newsletter.

#### **Action Items:**

- Ross will send an email message soliciting volunteers for a new Facebook Administrator.
- Example number 3 was selected for the TAP business cards.
- Solicitation will be submitted to the committee for committee projects for 2019.

### **Closing**

O'Sullivan thanked everyone for all they have done this year and officially closed the meeting.

**\*\*\*The is the last Internal Communications Committee meeting for the year.\*\*\***

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee  
Tuesday, August 28, 2018**

**TAP Members**

- [redacted] - Notices & Correspondence
- [redacted] - Taxpayer Communications (National Vice Chair)
- [redacted] - Special Projects
- [redacted] - Toll Free Phone Lines
- [redacted] - Taxpayer Assistance Centers
- [redacted] - Notice & Correspondence Committee (ICC Vice Chair)

**Absent Members**

- [redacted] Taxpayer Assistance Center (ICC Chair)
- [redacted] Toll Free Phone Lines
- [redacted] Notices & Correspondence
- [redacted] Taxpayer Communications
- [redacted] Forms & Publications
- [redacted] - Special Projects
- [redacted] Forms & Publications

**TAP Staff**

- Lisa Billups - Designated Federal Official (DFO) Acting
- Antoinette "Toni" Ross – Program Analyst
- Kevin Brown – Management Assistant
- Terrie English – TAP Director
- Gregory Giles – Program Analyst
- Cedric Jeans, TAP East Manager
- Rosalind Matherne – Program Analyst
- Matthew O'Sullivan – Program Analyst
- Fred Smith – Sr. Program Analyst

**Welcome/Opening**

Billups opened the call and welcomed the committee.

**Roll Call**

Quorum was not met for this meeting.

**Outreach Chair Report**

[redacted] spoke about three committees that need to turn in their reports for the monthly newsletter.



**Approving July 24, 2018 Minutes**

(b)(6) Minutes accepted as presented.

**Newsletter**

(b)(6) inquired about members who may not have turned in their reports for the newsletter.

(b)(6) spoke about and encourage participation on the TAP page. Ross spoke about adding the newsletter to the Facebook page each month.

**Facebook**

Ross encouraged members to join the TAP Facebook and for them to share the links to people they know.

**TAP DRAFT Referral-Issue 37323-TAP Business Cards**

(b)(6) Benefits and barriers and summary and conclusion must be discussed and completed according to Ross.

1. (b)(6) suggested including the state members are from and the Speak Up logo being current.
2. A comma was placed between the name with the two-letter state following it.
3. Citizen-Volunteer (working to improve IRS) was suggested by Hall.
4. The format was changed to put the mission statement and the member information on the front of the card.
5. Citizen-Volunteers working with the IRS added underneath the Mission Statement.
6. Ross will send the card to (b)(6) to see if she can make the graphic adjustments needed to the card draft.
7. Ross will send the draft before the next meeting for members to review and adjust, if needed.

Benefits are it is easier to read. This will help differentiate TAP from TAS. Clear up the misconception that TAP are IRS employees. Cleaner business cards. The format change makes the back of the card a complete call-to-action.



(b)(6)

(b)(6)

### **Final Thoughts**

(b)(6) inquired about sending an annual report to our stakeholder liaisons? They are available on [www.improveirs.org](http://www.improveirs.org). (b)(6) indicated that the newsletter is available on [www.improveirs.org](http://www.improveirs.org) also.

### **Closing**

(b)(6) thanked the staff for attending the call and Billups officially closed the meeting.

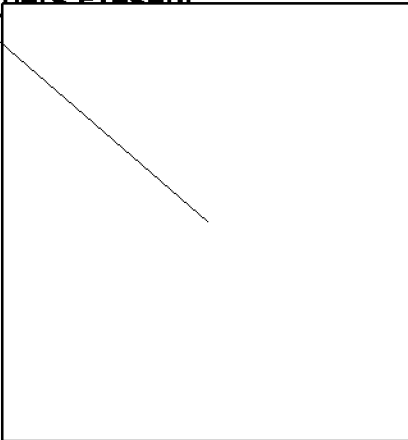
**The next Outreach Committee meeting is on September 25, at 2:00 PM EST**

**Internal Communications Committee(ICC)  
Monthly Meeting Minutes  
Tuesday, June 26, 2018**

(b)(6)

**Members Present**

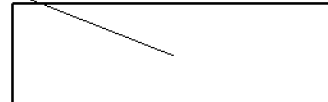
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(b)(6)

**Members Absent**

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**Designated Federal Officer**

- Gilbert Martinez

Designated Federal Officer

**Staff**

- |                          |                              |
|--------------------------|------------------------------|
| • Antoinette "Toni" Ross | TAP Analyst                  |
| • Gilbert Martinez       | TAP Analyst                  |
| • Rosalind Matherne      | TAP Analyst                  |
| • Robert Rosalia         | TAP Analyst                  |
| • Otis Simpson           | TAP Senior Analyst           |
| • Fred Smith             | TAP Senior Analyst           |
| • Gregory Giles          | TAP Analyst                  |
| • Kevin Brown            | TAP Administrative Assistant |

**Opening/Welcome**

Martinez opened the call and welcomed everyone ICC meeting. Martinez reminded the members of the pre-meetings and preparations for the members who will be attending. Ross indicated that Holley will chair the meeting in lieu of Torres' absence.

**Roll Call**

Brown

(b)(6)  
(b)(6)  
(b)(6)

**Chair Report**

(b)(6) thanked Ross for her assistance with the monthly Newsletter. (b)(6) repeated a suggestion from (b)(6) that using the newsletter as an outreach tool which is a good idea. (b)(6) reported a two-hour outreach event and proposed sending them last month's newsletter prior to the meeting.

**May 22, 2018 Minutes**

(b)(6) Minutes approved as submitted.

**Newsletter**

(b)(6) reported the newsletter is ready to go thanks to Ross' assistance.

**Facebook**

(b)(6) reported that she regularly monitors the page for posted items and access requests. (b)(6) acknowledged (b)(6) posts on the page also.

(b)(6) reported about 13 requests for access to the page in the last month. There was an inquiry on who could request access to the page and it was determined that anyone who wants to can have access to the page.

**Issue 27323- TAP Business Cards**

(b)(6) gave a suggestion of having TAP logo larger on the cards no matter which option the committee chooses.

(b)(6) selected Option #3

(b)(6) reported 5 responses from Special Projects all for Option #3

(b)(6) selected Option #3

Notices Committee- 3 for Option #3 and 3 for Option #3

TCC- 2 for Option #2 and 3 for Option #3

(b)(6) reported getting the rest of the results from the Joint Committee meeting on June 28, 2018, before the final tally is made. The current count for the ICC is:

5 for Option #2

11 for Option #3

**Closing**

Martinez formally closed the meeting.

**Next Call: June 26, 2018,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**

**Internal Communications Committee(ICC)  
Monthly Meeting Minutes  
Tuesday, May 22, 2018**

(b)(6)

**Members Present**

(b)(6)

- [Redacted]
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- [Redacted]
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- [Redacted]
- [Redacted]
- [Redacted]

(b)(6)

**Members Absent**

(b)(6)

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

**Designated Federal Officer**

- [Redacted]

Designated Federal Officer

**Staff**

- |                          |                              |
|--------------------------|------------------------------|
| • Terrie English         | TAP Director                 |
| • Cedric Jeans           | TAP East Chief               |
| • Antoinette "Toni" Ross | TAP Analyst                  |
| • Gilbert Martinez       | TAP Analyst                  |
| • Lisa Billups           | TAP Senior Analyst           |
| • Robert Rosalia         | TAP Analyst                  |
| • Fred Smith             | TAP Senior Analyst           |
| • Gregory Giles          | TAP Analyst                  |
| • Kevin Brown            | TAP Administrative Assistant |

**Opening/Welcome**

Jimerson opened the call and welcomed everyone to the ICC meeting.

**Roll Call**

Brown

(b)(6)

**Chair Report**

(b)(6) recalled a great first meeting. Torres reminded the committee of the action items of the last meeting which were:

- Set meetings for the fourth Tuesday of the month at 2:00pm Eastern Time.
- (b)(6) was elected Chair, (b)(6) was elected Vice Chair.
- (b)(6) and Hower volunteered as Facebook administrators.
- (b)(6) volunteered to be on the Newsletter team.

(b)(6)

**April 24, 2018 Minutes**

(b)(6) motioned to approve (b)(6) second. Minutes approved as submitted.

**Issue 37323- TAP Business Cards**

The committee went over several examples of cards to determine which one would be the best option for the entire panel. There were inquiries about whether the TAP or a personal email should be used. There was a discussion about personal or member phones numbers should be used as well. The staff indicated that a centralized email, phone number and address is standard to ensure communications were handled in a centralized area and filtered as needed.

(b)(6) Members will get feedback from their committees and provide recommendations from their committee via email by June 15, 2018 before the next meeting.

(b)(6)

**Newsletter**

(b)(6) reminded the committee the reports are due on the twenty-fifth day of month and should be sent to (b)(6) Martinez and Ross (b)(6) mentioned that Ross did a good job on this month's newsletter.

(b)(6)

**Facebook**

(b)(6) canvassed the committee to see who has signed up to the TAP Facebook page and offered assistance to members who may need help with this. (b)(6) will give a tutorial for the next meeting. "The Taxpayer Advocacy Panel" should be the search language used in Facebook in order to find the page. Ross reported that (b)(6) asked the committee Facebook administrator to check to see if there are any new friend requests or post.

(b)(6) requested a LinkedIn account for TAP. Ross will check on this request and report back to the committee.

(b)(6)

**Final Thoughts**

(b)(6) reminded the committee of the June 15, 2018 response date for new TAP business cards. LinkedIn account inquiry. Encourage committee members to join the TAP Facebook page. (b)(6) encourages members to get the activity reports in as soon as possible.



(b)(6)

**Action Items**

- (b)(6) will give tutorial for signing up to TAP Facebook page next meeting.
2. Provide feedback from committees regarding the business cards.
  3. Suggest members of each committee sign up to the TAP Facebook page.
  4. LinkedIn account review by Ross.

(b)(6)

**Closing**

(b)(6) formally closed the meeting.

**Next Call: June 26, 2018,  
at 2:00pm ET, 1:00pm CT, 12:00 pm MT, 11:00am PT**







(b)(6) Chair, (b)(6) for Vice Chair. (b)(6) motioned (b)(6)  
Seconded for Chair. (b)(6) motioned, V (b)(6) seconded for Vice Chair.

### **Establish Meeting Schedule**

(b)(6) Third Tuesday at 3:00pm ET agreed by committee. (b)(6)

### **Approve November 27, 2018 Minutes**

(b)(6) Minutes approved as submitted. (b)(6) motioned (b)(6) seconded.

### **Newsletter**

(b)(6) volunteered to take the lead on this project. Jimerson and Ross explained what was in the newsletter, which is to give the panel an idea of what each committee in TAP is doing. This is for the entire panel and for the public. An article from each committee is due by the twenty-fifth of each month and should be submitted to the ICC for the Newsletter. It is a high-level update about the committee's actions for the entire TAP, the alternate members and even for the public.

(b)(6) This task can be done by the Chair or someone they designate. Each committee member should give a report on what the ICC is working on at each committee meeting. (b)(6)

### **Facebook – Seeking Volunteers as Administrative**

(b)(6) volunteered to lead the Facebook page. The Twitter account will have to be run exclusively by the TAP members (b)(6) volunteered. (b)(6) volunteered to operate the twitter account for the entire panel.

### **Projects for TAP Year 2019**

(b)(6) Legacy projects were suggested by (b)(6) Social media posts should be reviewed by Ross before being posted onto the accounts for quality control. A social media guide could be something this committee worked on, according to Jimerson. English indicated there are guidelines by Communications, Stakeholder Liaison & Online Services (CSO) regarding social media accounts. We need to incorporate these guidelines into the operating of our TAP social media accounts. This will be a guide for us while setting up our social media guide.

(b)(6) In setting up a social media guide, we should line this project up with CSO by next month, according to Jimerson. (b)(6)

### **Final Thoughts**

(b)(6) suggested sharing phone numbers and emails for this committee. Ross is finalizing this and will send it to the committee once completed. (b)(6) highlighted the time difference since she is in Hawaii indicating that email is the best way to contact her. (b)(6) inquired about LinkedIn. Ross reported that the staff cannot operate this type of account. It would have to be done by the members just like the Twitter account. (b)(6) wants to discuss this on the next meeting.

(b)(6)



(b)(6) asked about the Chair and Vice chair pre-meeting. Ross informed that this meeting is usually held at least 5 days before the ICC full meeting. Ross being worked at this time.

**Action Items:**

- (b)(6) and Vice Chair (b)(6)
- Meeting Invite to be sent out for the 3rd Tuesday at 3pm EST each month
- Creating a social media guide. (Next Month)
- Proposal from (b)(6) on social media. (Next Month)
- Social media accounts such as Twitter and LinkedIn next month. (Next Month)
- Work on the pre-meeting with the Chair and Vice Chair. (Next Month)

**Closing**

Jimerson thanked everyone for all they offered to the call and closed the meeting.

***The Next Internal Communications Committee meeting on May 21, 2019 at 3:00pm EST***

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, April 28, 2020**

**Designated Federal Officer**

- Susan Jimerson Chief TAP West

**Committee Members Present**

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Member  
Member  
Chair  
Member  
Member  
Vice Chair  
Member

**Visiting TAP Members Present**

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TAP Chair  
TAP Vice Chair  
Toll Free Chair

**Committee Members Absent**

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Member  
Member  
Member  
Member

**TAP Staff Present**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Terrie English- TAP Director
- Cedric Jeans – TAP East Chief
- Rosalind Matherne-Program Analyst
- Gilbert Martinez-Program Analyst
- Matthew O'Sullivan- Program Analyst
- Robert Rosalia-Program Analyst
- Antoinette "Toni" Ross – Program Analyst

**Welcome/Opening**

Jimerson opened the call and welcomed everyone and gave a brief overview of what the ICC covers to include: Newsletter, Facebook, social media outreach program.

**Roll Call**

(b)(6) Brown took roll. (b)(6)

**Election of ICC Chair and Vice Chair**

(b)(6) (b)(6) nominate (b)(6) seconded, the nomination was unopposed. (b)(6) self-nominated (b)(6) seconded, the nomination for Vice Chair was unopposed.

(b)(6) (b)(6) Chair  
(b)(6) Vice Chair

**Set ICC Meeting Schedule**

(b)(6) (b)(6) motioned, there were no objections.  
Fourth Tuesday at 3:00pm ET

**Approve November 19, 2019 Minutes**

(b)(6) (b)(6) motioned (b)(6) seconded.  
**Action:** November Minutes approved as submitted

**Select Volunteers as Facebook Administrators (2)**

(b)(6) (b)(6) and (b)(6) (b)(6)

**Select Volunteer Newsletter Editors**

(b)(6) (b)(6) suggested rotating the editors the way it was done last year. (b)(6) requested clarity regarding due dates and what the reports should be about to make it easier for each committee. Jimerson explained the reports are due on the twenty-fifth day of the month with the goal of issuing the newsletter by the fifth day of each month. Giving where we are in this month, if we receive the articles by May 5, 2020, we can have the May newsletter out by May 15, 2020 according to Jimerson and (b)(6). (b)(6)

(b)(6) English pointed out how simple these first newsletter articles can be since the TAP year has just started. English also reiterated how important it is to get this information out to the taxpayers to put TAP's mission out to the public. TAP Staff will complete May and (b)(6) will complete the June newsletter. A full schedule will be completed for the next month's meeting. There is a library of newsletters on [www.tapSPACE.org](http://www.tapSPACE.org). Ross advised the members to get on their meeting agenda and to report what going on in the ICC and solicit reports for the newsletter. (b)(6)

**Final Thoughts**

(b)(6) (b)(6) inquired about the social media guide and where the references between TAP members and employees are.

**Closing**

Jimerson thanked everyone for joining the call and closed the meeting.

**The Next Internal Communications Committee meeting will be on May 26, 2020  
at 3:00 pm ET**

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, August 20, 2019**

(b)(6)  
**TAP Members**

(b)(6)

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**TAP Members Absent**

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**Staff**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Carolyn Duckworth- Program Analyst
- Terrie English- TAP Director
- Cedric Jeans- TAP East Chief
- Susan Jimerson- Designated Federal Official (DFO)
- Matthew O’Sullivan- Program Analyst
- Antoinette “Toni” Ross – Program Analyst

**Welcome/Opening**

Jimerson opened the call and welcomed everyone. Jimerson reported someone from technology and multimedia will be assigned to help us put together the social media guide for the committee to review.

**Roll Call**

Brown took roll.

**Approve July 16, 2019 Minutes**

Minutes will be tabled to next month.

(b)(6)  
(b)(6)  
(b)(6)  
**Newsletter- Assignments for TAP/Newsletter Assembly**

(b)(6) set a schedule and assigned each member a month to work the newsletter. The articles should be sent to (b)(6) Ross, and (b)(6) each month. Moretti described his efforts to get the monthly articles. (b)(6) sends monthly reminders to each committee to get articles and monthly summaries.

(b)(6)  
(b)(6)

### **Facebook**

This is still in a holding pattern until the social media guide can be established according to (b)(6) will forward the guide that was received from the head of social media from last year's ICC. (b)(6) proposed starting the library of content even before the guide has been completed and automate this form. (b)(6) has proposed starting an outward facing social media accounts for TAP. The details will be worked on during the next meeting.

(b)(6)

### **TAP-ICC Social Media Guide Outline**

(b)(6) indicated we will start creating content and a table of contents next month. Jimerson suggested attending the Outreach Committee meeting tomorrow towards gathering content for the social media guide.

(b)(6)

#### **Action Items:**

- Send email to chairs for newsletter articles to be submitted by August 25, 2019.
  - Agenda-Review ICC Continuation Manual for updating.
  - Create a Library of Content for Social Media (b)(6) will have examples ready (b)(6) to ask Outreach members for content at the next meeting (August 21, 2019).
  - Will ask for volunteers for content creation.
  - Pre-read: ICC Continuation Manual.
  - Meeting Minutes for Approval:
    1. July 16, 2019 Meeting Minutes
    2. August 20, 2019 Meeting
- (b)(6)

### **Closing**

Jimerson thanked everyone for joining the call and closed the meeting.

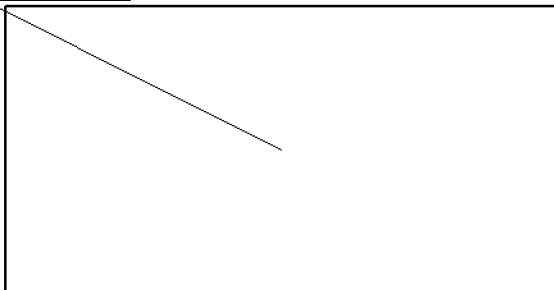
***The Next Internal Communications Committee meeting on September 17, 2019,  
at 3:00pm EST***

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, June 18, 2019**

(b)(6)

**TAP Members**

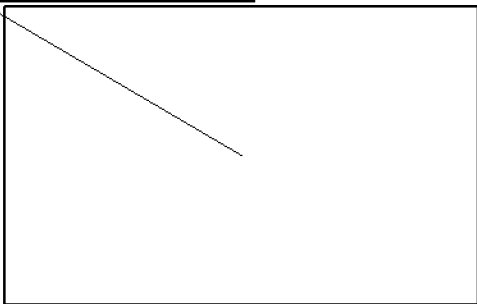
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(b)(6)

**TAP Members Absent**

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**Staff**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Conchata Holloway- Program Analyst
- Cedric Jeans – TAP Designated Federal Official (DFO)
- Antoinette “Toni” Ross – Program Analyst
- Rosalind Matherne – Program Analyst

**CSO Staff**

- Chamille Houston – CSO

**Welcome/Opening**

Jeans opened the call, thanked the members for attending the conference call and reviewed the agenda.

(b)(6)

**Roll Call**

Brown took roll.

(b)(6)

**Approve May 21, 2019 Minutes**

Minutes approved as submitted (b)(6) motioned for (b)(6) seconded.

(b)(6)

(b)(6)

(b)(6)

(b)(6)

(b)(6)

**Newsletter**

(b)(6) reported the Newsletter was just released. (b)(6) reminded the committee that these reports are due on the 25<sup>th</sup> of the month, please keep that in mind. It is also available on [www.tapspace.org](http://www.tapspace.org). (b)(6) remarked that the newsletter is getting too long. (b)(6) suggested using just the name, title and a short explanation of the issue to make the articles shorter. Links to articles or electronic items could also shorten the newsletter as well. (b)(6) asked why the newsletter gets delayed. Ross explained the review process and late submissions is the reason for this delay.

(b)(6)

**Facebook**

(b)(6) reported we are still awaiting guidelines before we can move forward on social media reports. This is still on hold for feedback from CSO. Jeans reported the discussion of the guidelines is still ongoing and will be addressed in more detail next month.

(b)(6)

(b)(6)

**TAP-ICC Social Media Guide Outline**

(b)(6) will be starting an outline for this process to be ready for when the guidelines are established. (b)(6) solicited volunteers for the other social media accounts so they are up and running when we are ready to get them started. (b)(6) will set them up and have the volunteers monitor and act as administrators of these accounts at some point in time. A discussion occurred about what could be put on the TAP Facebook group and how TAP could get items posted on the TAS webpage. Houston indicated requests for information to be placed on the TAS website must be submitted up the chain of command for review before it can be placed on the site.

**Final Thoughts**

Jeans indicated that we have some work to be done on social media accounts and how we can get items posted on the TAS website.

**Closing**

Jeans thanked everyone for joining the call and closed the meeting.

***The Next Internal Communications Committee meeting on July 16, 2019 at  
3:00pm EST***



**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, May 21, 2019**

(b)(6)

**TAP Members**

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**TAP Staff**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Carolyn Duckworth – Program Analyst
- Conchata Holloway- Program Analyst
- Cedric Jeans – TAP East Chief
- Susan Jimerson – TAP Designated Federal Official (DFO)
- Rosalind Matherne – Program Analyst
- Matthew O’Sullivan – Program Analyst
- Antoinette “Toni” Ross – Program Analyst
- Rosalind Matherne – Program Analyst
- Fred Smith – Program Analyst

**CSO Staff**

- Chamille Houston – Program Analyst

**Welcome/Opening**

Jimerson opened the call, thanked the members for the call and reviewed the agenda.

**Roll Call**

Brown took roll.

**Approve April 16, 2019 Minutes**

Minutes approved as amended.   motioned Smith seconded.

### **Newsletter**

reported and on this committee and indicated they were able to get the newsletter out. Any member who wants to can write an article for the newsletter. also highlighted article from and who made it into last month's letter. article was first published in The American Magazine. Please remember to submit your articles in four days.

### **Facebook**

suggested making the platform to be public facing as a page instead of as a group to allow a more outward facing tool. Chamille Houston, of CSO, indicated there must be some changes to ensure TAP is following IRS guidelines before changing from a group to a page in Facebook. Houston will send the current guidance to so the committee has it before the next meeting. Houston will continue to help with this project. A new meeting with Houston will be setup after the committee has reviewed Houston's documentation.

### **Proposal for LinkedIn**

This will be set as a company page with content directed towards professionals and private individuals. was looking for guidance on how to approach this since it must be run by TAP members only. A member of ICC should run it and allow a smooth and easy transfer to new members per

Hootsuite? Could be something used to accomplish this.

### **TAP-ICC Social Media Guide Outline**

We will need input from the Outreach Committee since they are in charge with outreach for the panel. will assist on behalf of the Outreach Committee for this part. We may be able to share things such as the TAP calendar and other things on [www.tap.space.org](http://www.tap.space.org) via these social media accounts and suggested making both the LinkedIn and the Facebook to be very similar to show unity between both social media pages, especially for search result options. These suggestions will help to maintain continuity between all TAP social media accounts to include the look of each account.

LinkedIn could also be a source to recruit new TAP members during the recruitment season.

### **Final Thoughts**

The differences between policies and guidelines will be determined after we get the IRS guidelines from CSO. We can start working on our accounts after this according to

### **Action Items:**

- Working with Chamille from CSO for social media guidelines.



- Set up a meeting regarding social media outline.

### **Closing**

Jimerson thanked everyone for all they offered to the call and closed the meeting.

***The Next Internal Communications Committee meeting on June 18, 2019 at  
3:00pm EST***



**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, May 26, 2020**

**Designated Federal Officer**

- Susan Jimerson      Chief TAP West

**Committee Members Present**

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Member  
Member  
Chair  
Member  
Member  
Vice Chair  
Member

**Visiting TAP Members Present**

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TAP Chair  
TAP Vice Chair  
Toll Free Chair

**Committee Members Absent**

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Member  
Member  
Member  
Member

**TAP Staff Present**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Terrie English- TAP Director
- Cedric Jeans – TAP East Chief
- Rosalind Matherne-Program Analyst
- Gilbert Martinez-Program Analyst
- Matthew O’Sullivan- Program Analyst
- Robert Rosalia-Program Analyst
- Antoinette “Toni” Ross – Program Analyst

**Welcome/Opening**

Jimerson opened the call and welcomed everyone and gave a brief overview of what the ICC covers to include: Newsletter, Facebook, social media outreach program.

**Roll Call**

Brown took roll.

(b)(6)

**Approve April 28, 2010 Minutes**

(b)(6) motioned, (b)(6) seconded.

**Action:** April Minutes approved as submitted.

(b)(6)

**Discuss Facebook Issues**

Issue will be tabled for next month.

(b)(6)

**Report on May 2020 Newsletter**

(b)(6) indicated they worked on the May newsletter and would like to encourage members to turn in their reports as soon as they can.

(b)(6)

**Discuss June 2020 Newsletter**

(b)(6) to do the June. (b)(6) will do August newsletter.

(b)(6)

**Final Thoughts**

(b)(6) reported that members will need to encourage their committees to get creative with outreach and to turn in their activity reports on time.

**Closing**

Jimerson thanked everyone for joining the call and closed the meeting.

**The Next Internal Communications Committee meeting will be on June 23, 2020  
at 3:00 pm ET**



**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, November 19, 2019**

## ~~TAP~~ Members

(Visiting Member)

(Chair)

**~~TAP Members Absent~~**

## Staff

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Cedric Jeans – TAP East Chief
- Susan Jimerson- Designated Federal Official (DFO)
- Matthew O'Sullivan- Program Analyst
- Antoinette "Toni" Ross – Program Analyst
- Robert Rosalia-Program Analyst
- Fred Smith- Program Analyst
- Rosalind Matherne-Program Analyst

## Welcome/Opening

Jimerson opened the call and welcomed everyone.

## Roll Call

Brown took roll.

**Approve September 17, 2019 Minutes**

\_\_\_\_\_ motioned \_\_\_\_\_ seconded. Minutes accepted as submitted.

**Action:** October Minutes approved as submitted

## ICC Chair Report

spoke about the Annual Report submission, which was submitted to [REDACTED]. All the grammar corrections were accepted, and the report has been finalized.

## Newsletter Editors

\_\_\_\_\_ will complete the December newsletter. \_\_\_\_\_ reported the outreach reports have been used to catalog outreach and help future member outreach efforts.

Jimerson suggested adding a special section to include a tribute to our 19 retiring members.

### **Project Work**

- Taxpayer Advocacy Social Media Guidance Review

The guide was put out to be reviewed by the entire panel last month. A number of responses were received for Ross to work with Chamille Houston to work on this.

- Review Revised ICC Continuation Manual

Moretti indicated that Ross has the comments for this document and has placed it on the [www.tapSPACE.org](http://www.tapSPACE.org) site.

- Request content for the social media library on TAPSpace

reported working on this project to ensure it has many examples for members to be able to use for social media documents/projects. indicated there is a lot of good content on the site to include other member options also. Moretti suggested members review this library.

### **TAP Year 2020 Project**

- Update the Outreach Tool Kit in TAPSpace

suggested ways on reviewing the tool kit next year to keep things fresh. suggested working with the Outreach committee to accomplish this task next year.

### **Final Wrap-up**

point out how much the social media helped the outreach this year. thanked and for their effort this year. congratulated on being the Vice Chair next year and thanked the committee for welcoming her this year. reminded members to continue to do outreach, turn in your activity reports, select your returning committee and consider being a mentor for next year.

thanked all the staff both in front and behind the scenes for all of their help this year. Ross reminded the committee that and re Facebook administrators for next year. Jimerson thanked for stepping up to the Chair position and to all the members and their efforts this year. Jimerson reminded everyone to cancel meetings and invites on your calendar for this year. thanked the committee for all they have done this year.

### **Action items:**

- Minutes uploaded to TAPSpace
- Letter for retiring members
- Outreach and ICC working on the Outreach Tool Kit next year

### **Closing**

Jimerson thanked everyone for joining the call and closed the meeting.

**The Next Internal Communications Committee meeting TBD 2020**

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, October 29, 2019**

(b)(6)

**TAP Members**

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(b)(6)

**TAP Members Absent**

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**Staff**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Susan Jimerson- Designated Federal Official (DFO)
- Matthew O’Sullivan- Program Analyst
- Antoinette “Toni” Ross – Program Analyst
- Robert Rosalia-Program Analyst
- Otis Simpson- Program Analyst
- Fred Smith- Program Analyst
- Rosalind Matherne-Program Analyst
- Chamille Houston, CSO Program Analyst

**Welcome/Opening**

Jimerson opened the call and welcomed everyone.

**Roll Call**

(b)(6)  
Brown took roll.

**Approve September 17, 2019 Minutes**

(b)(6) motioned, (b)(6) seconded. Minutes accepted as submitted.

(b)(6)  
Action: September Minutes approved as submitted

**ICC Chair Report**

(b)(6) reported that (b)(6) stepped down as chair but is still a part of the committee. (b)(6) welcomed (b)(6) to the committee. Moretti asked members to review the annual report and make any changes or additions as needed. Frausto will review this and all the other reports as Chairperson of Annual Report Committee.



(b)(6)  
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### **Newsletter Editors**

(b)(6) thanked (b)(6) and (b)(6) for the September and October newsletters and indicated that (b)(6) will be completing the November newsletter and Bowser will complete the December newsletter. Ross explained how the process for putting the newsletter together works. (b)(6) and Ross will work to complete this project very soon.

### **Project Work**

- Taxpayer Advocacy Social Media Guidance Review

(b)(6) The Guide will be sent to the TAP membership and TAP staff for review. The due date was established, November 12, 2019, and sent to (b)(6) and Ross who will make changes as needed.

- Review Revised ICC Continuation Manual

Ross indicated the need for another member to become an administrator for the Facebook account. (b)(6) has already volunteered, and (b)(6) agreed to be a Facebook administrator.

- Request content for the social media library on TAPSpace

Ross will send email to TAP to submit social media contact for TAPSpace. Ross showed the committee where the social media content folder is on the [www.tapspace.org](http://www.tapspace.org) website. Chamille Houston, CSO analyst, will work to pull additional messaging up for this project as needed.

### **TAP Year 2020 Project**

- Update the Outreach Tool Kit in TAPSpace

The committee reviewed the Outreach Tool Kit and realized there is a need to update some sections of the tool kit. This project will be started in the 2020 TAP year.

### **Final Wrap-up**

#### **Action Items:**

- ICC Continuation Manual sent via email to ICC members for their final review with a due date of November 12, 2019
- Review Social Media Guide by entire TAP for next month. Guide sent to TAP Members with a due date of November 12, 2019
- Work with Houston for social media guide review
- Work on Outreach Tool Kit for TAP Year 2020

### **Closing**

Jimerson thanked everyone for joining the call and closed the meeting.

***The Next Internal Communications Committee meeting on November 19, 2019,  
at 3:00pm EST***

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee (ICC)  
Tuesday, September 17, 2019**

(b)(6)

**TAP Members**

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(b)(6)

**TAP Members Absent**

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**Staff**

- Lisa Billups- Sr. Program Analyst
- Kevin Brown – Management Assistant
- Carolyn Duckworth- Program Analyst
- Terrie English- TAP Director
- Cedric Jeans- TAP East Chief
- Susan Jimerson- Designated Federal Official (DFO)
- Matthew O’Sullivan- Program Analyst
- Antoinette “Toni” Ross – Program Analyst
- Robert Rosalia-Program Analyst
- Rosalind Matherne-Program Analyst

**Welcome/Opening**

Jimerson opened the call and welcomed everyone.

**Roll Call**

Brown took roll.

**Approve July 16, 2019; August 20, 2019 Minutes**

(b)(6)

Approval of the July Meeting Minutes: Revision on page 1, Welcome/Opening “This is the Nina Olson, the National Taxpayer Advocate’s last week.” was changed to This is Nina Olson’s, the National Taxpayer Advocate, last week and page 2, Newsletter-Assignments for TAP/Newsletter Assembly. Second paragraph, purchases was changed to purposes. (b)(6) motioned, (b)(6) seconded.

Action: July Minutes approved as amended

Approval of the August Meeting Minutes (b)(6) motioned, (b)(6) seconded.

Action: August Minutes approved as submitted.

## **Project Work**

### **Review ICC Continuation Manual for updating**

Ross accepted corrections suggested by [REDACTED]. The committee reviewed the documents on WebEx to ensure that everything is accurate. [REDACTED] will appoint [REDACTED] the Facebook administrator for next year. [REDACTED] will review the ICC Continuation Manual once more before uploading to TAPSpace.

### **Create a Library of Content for Social Media**

[REDACTED] showed the committee some options of what she shares on her social media account as a point of reference.

### **Final Thoughts**

[REDACTED] shared his interaction with the Montana Local Taxpayer Advocate and the level of service they provided to a taxpayer.

### **Final Wrap-up**

[REDACTED] reported that [REDACTED] will be replacing [REDACTED] from the Tax Forms and Publications committee. [REDACTED] will communicate with [REDACTED] before the next meeting about the December newsletter.

### **Action Items:**

- July minutes were amended.
- [REDACTED] will clean up the continuation manual and post it to TAPSpace.

### **Closing**

Jimerson thanked everyone for joining the call and closed the meeting.

***The Next Internal Communications Committee meeting on October 15, 2019, at  
3:00pm EST***

**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee  
July 24, 2018**

**TAP Members**

- [redacted] Notices & Correspondence (Absent)
- [redacted] Taxpayer Communications Vice Chair
- [redacted] Taxpayer Assistance Center
- [redacted] Toll Free
- [redacted] Notices & Correspondence
- [redacted] Special Projects
- [redacted] – Toll Free Committee (Absent)
- [redacted] Taxpayer Communications (Absent)
- [redacted] Forms & Pubs. (Absent)
- [redacted]
- [redacted] Special Projects (Absent)
- [redacted] Tax Forms and Publications - Chair
- [redacted] – Notice & Correspondence Committee

**TAP Staff**

- Lisa Billups - Program Analyst
- Kevin Brown – Management Assistant
- Terrie English – TAP Director
- Gregory Giles – Program Analyst
- Cedric Jeans, Designated Federal Official (DFO)
- Susan Jimerson – TAP West Manager
- Gilbert Martinez – Program Analyst
- Rosalind Matherne – Program Analyst
- Maryclaire Ramsey- Director CSO
- Robert Rosalia – Program Analyst
- Antoinette “Toni” Ross – Program Analyst
- Otis Simpson – Program Analyst

**Welcome/Opening**

Jimerson welcomed the members and staff to the teleconference and declared the meeting opened. [redacted] and will resign as a TAP member effective today.

**Roll Call**

Quorum was met for this meeting.

**Outreach Chair Report**

[redacted] spoke about three committees that needs to turn in their reports for the monthly newsletter.

**Approving June 26, 2018 Minutes**

Minutes accepted as presented.

**Facebook**

reported no new request to join, but did post some stories onto the page. liked and shared them and encouraged everyone to review the page regularly. Hower spoke about posting and sharing stories posted by the National Taxpayer Advocate.

**Newsletter**

oke about and encourage participation on the TAP page. Ross spoke about adding the newsletter to the Facebook page each month.

**Issue 27323-TAP Business Cards**

Option #3 received most votes. The committee discussed additional options about the cards. The committee has agreed to add the Facebook information on the business cards.

**Action:** Option #3 accepted as future cards for the next TAP year.

Jimerson thanked for all he has done for TAP. English thanked for everything he did in such a short time while working as the committee Chair. thanked for his energy and effort while being a TAP member and all he brought to the TAP. let everyone know he appreciates all the kind words and stressed that he will continue to serve the taxpayers in some capacity.

Clarification was provided that TAP is an independent organization that works with the IRS. TAP is not part of the IRS, but we are a partner working for taxpayers as part of the Taxpayer Advocate Services.

**Rebranding TAP**

This will be tabled for a later date. The Joint Committee will discuss this issue before it comes back to this committee.

**Final Thoughts**

volunteered as the new Vice Chair for the ICC. motioned, seconded. Jimerson reminded the committee to give an ICC report during their monthly meetings.

**Action:**

**Closing**

thanked the staff for attending the call and Jeans officially closed the meeting.

**The next Outreach Committee meeting is on August 27, at 2:00 EST**



**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee  
Tuesday, September 25, 2018**

**TAP Members**

- [redacted] Taxpayer Communications (National Vice Chair)
- [redacted] – Taxpayer Assistance Center (ICC Chair)
- [redacted] Toll Free Phone Lines
- [redacted] Forms & Publications
- [redacted] Special Projects
- [redacted] Toll Free Phone Lines
- [redacted] Taxpayer Assistance Centers
- [redacted] Notice & Correspondence Committee (ICC Vice Chair)

**Absent Members**

- [redacted] Notices & Correspondence
- [redacted] Notices & Correspondence
- [redacted] Taxpayer Communications
- [redacted] Special Projects
- [redacted] Forms & Publications

**TAP Staff**

- Lisa Billups - Designated Federal Official (DFO) Acting
- Antoinette "Toni" Ross – Program Analyst
- Kevin Brown – Management Assistant
- Gregory Giles – Program Analyst
- Tyra Lindsey – Program Analyst
- Rosalind Matherne – Program Analyst
- Matthew O'Sullivan – Program Analyst
- Tracy Rohrs– Program Analyst

**Welcome/Opening**

Billups opened the call and welcomed the committee.

**Roll Call**

Quorum was not met for this meeting.

**Chair Report**

[redacted] spoke about voting on the referral today. [redacted] reported submitting the committee report to [redacted] for the Annual Report. [redacted] reported the project of rebranding TAP will be tabled until next year. It is all encompassing because it is a huge project involving all aspects of TAP.

(b)(6)  
(b)(6)

**Approve August 28, 2018 Minutes**

(b)(6) corrected Facebook report to remove her name as she was not on the call. Hower motioned, (b)(6) seconded. Minutes accepted as amended. (b)(6)

**Newsletter**

(b)(6) The newsletter reminders have gone out for the reports to put it together. (b)(6) expects to complete the newsletter by this Friday.

**Facebook**

(b)(6) encouraged members to post on the Facebook page so they can be reviewed and posted if appropriate to the TAP mission.

(b)(6) **Approve TAP Referral 37323-TAP- Business Cards**

Committee approved the referral to be elevated to Joint Committee.

**Final Thoughts**

(b)(6) reported the afterhours call script referral being accepted by the IRS.

**Action Items:**

- Reminder to be sent to the committees to submit an article for the newsletter.
- Reminder to be sent to the committees to submit their activity reports.
- Billups reminded the committee to discuss if the newsletter would continue to be produced during the months of December, January and February during the last meeting of the year.
- Referral 37323 elevated to the JC for October meeting.

**Closing**

Billups officially closed the call.

**The next Internal Communications Committee meeting is on  
October 23, 2018 at 2:00 PM EST**



**Taxpayer Advocacy Panel (TAP)  
Internal Communications Committee  
Tuesday, July 24, 2018**

**TAP Members**

- [redacted] Taxpayer Communications (Panel Vice Chair)
- [redacted] – Taxpayer Assistance Center (ICC Chair)
- [redacted] – Toll Free Phone Lines
- [redacted] Notices & Correspondence
- [redacted] – Special Projects
- [redacted] Taxpayer Assistance Centers
- [redacted] – Tax Forms & Publications – Former ICC Chair
- [redacted] – Notice & Correspondence Committee (ICC Vice Chair)

**Absent Members**

- [redacted] Notices & Correspondence
- [redacted] – Toll Free Phone Lines
- [redacted] Taxpayer Communications
- Robin Sabio - Forms & Publications
- [redacted] - Special Projects

**TAP Staff**

- Lisa Billups - Program Analyst
- Antoinette "Toni" Ross – Program Analyst
- Kevin Brown – Management Assistant
- Terrie English – TAP Director
- Gregory Giles – Program Analyst
- Cedric Jeans, TAP East Manager
- Susan Jimerson – Designated Federal Official (DFO)
- Gilbert Martinez – Program Analyst
- Rosalind Matherne – Program Analyst
- Robert Rosalia – Program Analyst

**CSO Staff**

- Maryclaire Ramsey, Director CSO
- Sheila Andrews, Deputy Director CSO

**Welcome/Opening**

Jimerson welcomed the members and staff to the teleconference and declared the meeting opened. [redacted] stepped down as the Chair and will resign as a TAP member effective today.

**Roll Call**

Quorum was met for this meeting.

**Outreach Chair Report**

spoke about three committees that needs to turn in their reports for the monthly newsletter.

**Approving June 26, 2018 Minutes**

Minutes accepted as presented.

**Facebook**

reported no new request to join, but did post some stories onto the page. liked and shared them and encouraged everyone to review the page regularly. spoke about posting and sharing stories posted by the National Taxpayer Advocate.

**Newsletter**

spoke about and encourage participation on the TAP page. Ross spoke about adding the newsletter to the Facebook page each month.

**Issue 27323-TAP Business Cards**

reported that Option #3 received most votes. The committee discussed additional options about the cards. The committee has agreed to add the Facebook information on the business cards.

**Action:** Option #3 accepted as future business cards for the next TAP year.

Jimerson thanked for all he has done for TAP. English thanked for everything he did in such a short time while working as the committee Chair. thanked for his energy and effort while being a TAP member and all he brought to the TAP let everyone know he appreciates all the kind words and stressed that he will continue to serve the taxpayers in some capacity.

Clarification was provided that TAP is an independent organization that works with the IRS. TAP is not part of the IRS, but we are a partner working for taxpayers as part of the Taxpayer Advocate Services.

**Rebranding TAP**

This will be tabled for a later date. The Joint Committee will discuss this issue before it comes back to this committee.

**Final Thoughts**

volunteered as the new Vice Chair for the ICC motioned seconded. Jimerson reminded the committee to give an ICC report during their monthly meetings.

(b)(6)



**Taxpayer  
Advocacy Panel**  
IMPROVING THE IRS

(b)(6)

**Action:** [redacted] is new committee Vice Chair

(b)(6)

**Closing**

[redacted] thanked the staff for attending the call and [redacted] officially closed the meeting.

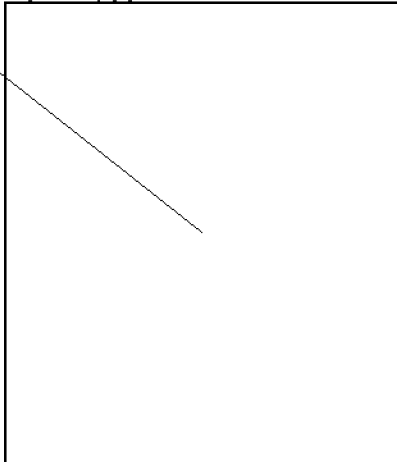
**The next Outreach Committee meeting is on August 28, at 2:00 PM EST**

**Internal Communications Committee  
Meeting Minutes  
Tuesday, June 13, 2017**

(b)(6)

**Members Present**

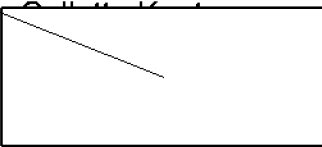
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(b)(6)

**Members Absent**

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**Staff Members**

- Javier Hernandez
- Sheila Andrews
- Susan Jimerson
- Cedric Jeans
- Gilbert Martinez
- Robert Rosalia
- Otis Simpson
- Lisa Billups
- BJ Burleigh

**Welcome/Open Meeting**

Jimerson opened the call and welcomed everyone to the meeting.

**Review Agenda**

Jimerson and  reviewed the agenda and noted no changes needed.

### **Identify Projects**

Newsletter- The discussion was about the format and information to be used for the content. The articles are due by the fifth of the month and the newsletter will be completed by the fifteenth of the month. Jimerson suggested using the meeting minutes as a source for the articles. There will be a section with great outreach activity for the Panel to be able to refer to.

### **Newsletter- Identify and Set Parameters for Articles**

The Newsletter approval flow will be: [redacted] and [redacted] will send the newsletter to Martinez who will review and upload the approved newsletter. The first newsletter will be for June as best as can be done. Martinez will send the three articles to [redacted] and [redacted] sometime today. This Friday will be the deadline for any additional articles for the June newsletter. June 26 or 27, 2017 are the target dates for the completion. Changes will be made if the target date is out of reach.

### **Social Media**

Martinez will give the information to [redacted] and [redacted]. In addition, Panel members will be encouraged to sign up for the TAP Facebook page in the newsletter.

Thompson solicited input for other social media mediums to ensure TAP is reaching multiple audiences. Hower suggested LinkedIn and others feeding into one another to ensure a broad coverage for TAP's message. [redacted] suggested including the Facebook or Twitter page link being sent with our communications to other organizations.

### **Action Items**

- The Facebook flow will discussed during the next meeting.
- Meeting will be set up with [redacted] and [redacted] regarding collaboration.
- Martinez will reach out to committees missing articles for the newsletter.

### **Final Thoughts**

Martinez will send reminder that July's articles will be needed shortly after June's.

### **Closing**

[redacted] thanked all for attending and closed the call.

**The Next Internal Communications Meeting is tentatively scheduled for:  
July 11, 2017 Call –In Number: 1-888-331-8226 AC [redacted]**

**Internal Communications Committee  
Meeting Minutes  
Tuesday, July 11, 2017**

(b)(6)

**Members Present**

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(b)(6)

**Members Absent**

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**Staff Members**

- Lisa Billups
- Susan Jimerson
- Cedric Jeans
- Lisa Billups
- Matthew O'Sullivan
- Gilbert Martinez
- Robert Rosalia
- Otis Simpson
- Gretchen Swayzer
- BJ Burleigh

**Welcome/Open Meeting**

Jimerson opened the call and welcomed everyone to the meeting. Jimerson reviewed the agenda and noted no changes needed.



### **Review Agenda and Minutes**

Jimerson reviewed the agenda. [redacted] motioned and [redacted] seconded, minutes accepted as approved.

### **Identify Projects**

[redacted] suggested an organizational flowchart showing who is in charge in relation to TAP and the IRS being placed on TAPSpace. [redacted] reported that there is one on the TAP manual and on TAPSpace already. [redacted] suggested it being put on the newsletter along with other educational pieces from time to time. The chart should also be searchable from TAPSpace to make sure it is accessible to members.

[redacted] suggested to link names and contact information to the organizational chart online. Publication 5136 is another link that has answers dealing with income taxes, according to [redacted] and Martinez will work together on this project.

### **Newsletter- Identify and Set Parameters for Articles**

Suggested that each committee member talk with the chair to find out who will write the article for their committee for the newsletter. This decision should be given to Martinez so he knows who will be submitting the newsletter articles. [redacted] shouted out [redacted] for getting the newsletter out for June. The June newsletter will be emailed to members, alternates, the Facebook page and posted to [www.tapSPACE.org](http://www.tapSPACE.org) by Martinez.

The parameters for the newsletter will be as follows:

- The newsletter will be in quarter page format. (minimum 2 pages)
- A minimum 250 words, single spaced per committee.
- All decisions regarding spacing and formatting will be made by the newsletter committee for large and small articles.

The education piece can be a space filler for committees who do not submit a report. Parameters will be reviewed by the newsletter committee to determine their effectiveness. Lisa Billups will provide last year's parameters to Martinez as a reference.

### **Social Media**

Martinez spoke of working with the Outreach Committee to update the virtual outreach flyer for 2018. [redacted] worked on editing the flyer based on its purpose and considering the medium it would be distributed by. The purpose should be maybe part of the training and warning members of what TAP can and cannot say and directing members where to get messages to disseminate. The current file should be trimmed down a bit for better reading.

(b)(6)  
(b)(6)



**Taxpayer  
Advocacy Panel**  
IMPROVING THE IRS

☐ spoke about press releases as an easy way to get members to do more outreach in the simplest way possible. ☐ shared some sample releases to his committee to help members understand how easy this process can be.

(b)(6)

### **Facebook – Guidelines and Process**

Martinez reported that Facebook is already being worked now. It's a public group. We can email the link to the page and allow members to join as they wish. Martinez and ☐ will work to get the group email together.

### **Action Items**

- Collaboration meeting with the Outreach Committee next week.
- Talk about samples of press releases from ☐ and ☐.
- Add chain of command or staff chart to TAPSpace and newsletter.
- Email June newsletter to all of TAP
- Newsletter will go to all TAP members, alternates, Facebook and TAPSpace next time.
- Finalize the parameters for the articles of the newsletters.
- Work with ☐ for emails group to send a link to join TAPs Facebook

(b)(6)

(b)(6)

### **Final Thoughts**

☐ credited the committee with making a great newsletter.

### **Closing**

Jimerson thanked all for attending and closed the call.

(b)(7)(E)

**The Next Internal Communications Meeting is tentatively scheduled for:  
August 8, 2017 Call –In Number: 1-888-331-8226 AC ☐**

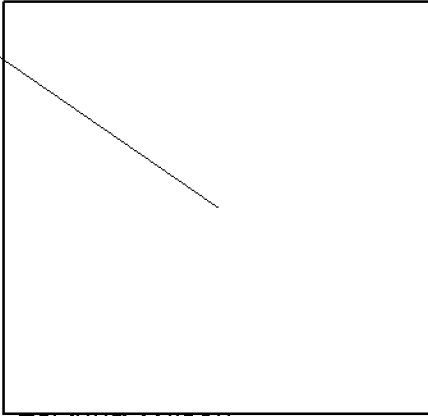


**Internal Communications Committee (ICC)  
Meeting Minutes  
Tuesday, August 8, 2017**

(b)(6)

**Members Present**

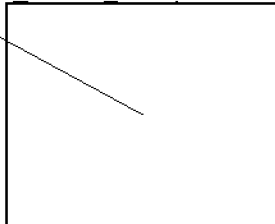
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(b)(6)

**Members Absent**

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**Staff Members**

- Susan Jimerson
- Cedric Jeans
- Lisa Billups
- Antoinette "Toni" Ross
- Matthew O'Sullivan
- Kudiratu Usman
- Gilbert Martinez
- Robert Rosalia
- Otis Simpson
- Rosalind Matherne

**Welcome/Open Meeting**

Martinez opened the call and welcomed everyone to the meeting.

**Review Agenda and Minutes**

Jimerson reviewed the agenda. Minutes accepted as approved.

(b)(6) (b)(6)

### **Identify Projects**

(b)(6) spoke about the organization chart project that is being done by (b)(6) and Gilbert Martinez. This project should be completed by the end of the week according to Martinez. The chart will be in the newsletter as a link, on [www.tapspace.org](http://www.tapspace.org), and on the Facebook page. The articles are due on August 10, 2017, to allow time for the newsletter to be completed.

Martinez will send a solicitation for topics to be worked on for next year. Jimerson suggested thinking of topics to discuss during the Joint Committee Face to Face meeting. Please send at least two ideas by August 14, 2017, to Martinez to be added to the ICC agenda.

(b)(6)  
(b)(6)

### **Newsletter**

(b)(6) reported that there is nothing new, but we are still waiting for articles from committees. (b)(6) is working with Jeans to implement the suggested changes to the virtual outreach flyer and they will be reviewed this Thursday, August 17, 2017, on the next Outreach Committee call.

(b)(6)

### **Social Media**

(b)(6) are working on the updated Virtual Outreach Flyer. (b)(6) will implement the recommended changes and they will be reviewed by the Outreach Committee by on WebEx on August 17, 2017.

(b)(6) mentioned that we are open for any suggestions for this process. (b)(6) suggested that some of the links from the outreach flyer can be added to the newsletter since they have some really good information.

(b)(6)  
(b)(6)

(b)(6) suggested including what can and can't be added via social media for new TAP members. (b)(6) mentioned that we are trying to make it easier for members who do not use social media often to be able to start. We would like to make a library of canned messages allowing members to copy and paste into social media accounts. The Outreach Committee remains open to any new suggestions. (b)(6) indicated that allowing members to send ideas about outreach for the newsletter was a fabulous.

(b)(6)

### **Facebook**

(b)(6)

Martinez reported that Facebook is already being worked now. It's a public group. We can email the link to the page and allow members to join as they wish. Martinez and (b)(6) will work to get the group email together.

(b)(6)

### **Final Thoughts**

(b)(6) brought a compliment from someone, from his local school system, who appreciates the help and assistance she has received from the Internal Revenue Service (IRS). Access to [www.imroveirs.org](http://www.imroveirs.org) and [www.tapspace.org](http://www.tapspace.org) is limited from IRS

and some personal computers. The issue is currently being resolved internally. [REDACTED] reported that if you receive complaints or issues, get as much information as you can so you make this an issue. The Tax Forms and Publications committee is currently working on this type of issue with fax numbers.

Martinez spoke about finalizing parameters for the newsletter articles. The comparison is 800 characters from last year or 250 words for this year. This topic is still being researched. Regarding the articles received, formatting and grammatical changes can be done, but content changes have to be approved by the authors of the articles.

### **Closing**

Jimerson thanked all for attending and closed the call.

**The Next Internal Communications Meeting is tentatively scheduled for:  
September 12, 2017 Call –In Number: 1-888-331-8226 AC [REDACTED]**

**Internal Communications Committee (ICC)  
Meeting Minutes  
Tuesday, September 12, 2017**

(b)(6)

**Members Present**

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(b)(6)

**Members Absent**

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**Staff Members**

- Susan Jimerson
- Cedric Jeans
- Lisa Billups
- Antoinette "Toni" Ross
- Matthew O'Sullivan
- Gilbert Martinez
- Robert Rosalia
- Fred Smith

**Welcome/Open Meeting**

Billups opened the call and welcomed everyone to the meeting.

**Review Agenda and Minutes**

Billups reviewed the agenda. Minutes accepted as approved.



### Identify Projects

[redacted] spoke of receiving great feedback about the newsletter and Facebook from the Joint Committee (JC) planning meeting. A continuation manual was what came out of the meeting as a guide for new members to this committee to have a reference to start from. [redacted] inquired about who this continuation manual was for and [redacted] indicated it was just for this committee.

The start for this project will be the newsletter and the specifications for how it is done. [redacted] indicated that this has already been done by [redacted], Gilbert Martinez and himself has already done this and can get these write ups over to [redacted] soon. Facebook will be worked on by [redacted]. Hower suggested including the process of getting the administrative rights in this write up also. [redacted] suggested including the kinds of things that are posted on Facebook.

An overview of social media will be addressed for Twitter LinkedIn and Instagram by Martinez indicated that this is part of the Social Media flyer which is currently being worked by [redacted] out of the Outreach Committee. The three of them will take this part of the task on. [redacted] suggested an overview of what the IC does and how it relates to the Outreach Committee. We can reference the Social Media Flyer, but we should make sure it is only a reference per [redacted] will take the overview section of this project. [redacted] offered to gather the information and putting it into a final format once this sections have been completed. [redacted] suggested [redacted] to help with this part of the project as she has great editing skills.

### Newsletter

[redacted] indicated that they have not received any articles for the newsletter that were too long so there is no issue with this. [redacted] reported that during the JC Planning meeting they discussed putting links to Facebook and [www.improveirs.org](http://www.improveirs.org) in the newsletter as a helpful tool. [redacted] asked the committee to like and share the pictures and posts on the Facebook page.

### Social Media

The TAP Pocket Guide is posted online in the Outreach Toolkit but will not be printed. [redacted] asked about the Speak Up Brochure and Jimerson reported this has been sent to be printed and there are some issues currently being worked out at the publishing office. We do have a current copy from last year that has been printed and is available for use now. The red, white and blue version is still being worked on. Jimerson indicated that the Outreach Toolkit is being reviewed and the old or outdated information will be archived by the staff very soon.

[redacted] suggested September 29, 2017 as a first deadline for this project.

(b)(6)



**Taxpayer  
Advocacy Panel**  
IMPROVING THE IRS

### **Facebook**

[redacted] suggested posting and reposting items that are on social media pages regularly to continue to keep TAP name out there.

### **Final Thoughts**

Billups reported about efforts to improve the [www.improveirs.org](http://www.improveirs.org) and asked for suggestions. Billups suggested letting her know if there is success outreach that needs to be uploaded to the website to be sure current outreach efforts are included on the website. The next step will be updating [www.TAPspace.org](http://www.TAPspace.org). Send information to Lisa Billups or Gilbert Martinez.

### **Action Items**

- Continuation Manual on how IC works.
- Assignments for this project were given.
- Write ups will be sent to [redacted] by September 29, 2017.
- Get on project committee agenda to share how to get to the TAP Pocket Guide from [www.TAPSpace.org](http://www.TAPSpace.org).
- Billups working suggestions on how to improve [www.improveirs.org](http://www.improveirs.org).
- Billups working improving [www.TAPSpace.org](http://www.TAPSpace.org) with current information.

(b)(6)

### **Closing**

Billups thanked all for attending and closed the call.

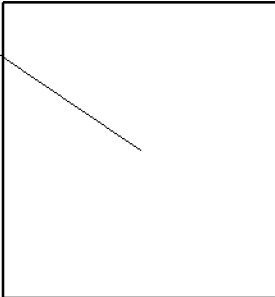
(b)(7)(E)

**The Next Internal Communications Meeting is tentatively scheduled for:  
October 10, 2017 Call –In Number: 1-888-331-8226 AC [redacted]**

**Internal Communications Committee (ICC)  
Meeting Minutes  
Tuesday, October 10, 2017**

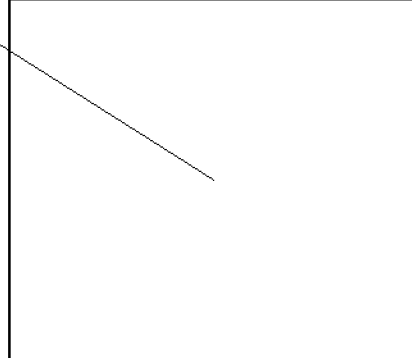
(b)(6)

**Members Present**

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(b)(6)

**Members Absent**

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**Staff Members**

- Susan Jimerson
- Cedric Jeans
- Lisa Billups
- Antoinette "Toni" Ross
- Matthew O'Sullivan
- Gilbert Martinez
- Rosalind Matherne
- Otis Simpson
- Robert Rosalia
- Fred Smith
- Gretchen Swayzer

**Welcome/Open Meeting**

Jimerson opened the call and welcomed everyone to the meeting.

**Review Agenda and Minutes**

Martinez reviewed the agenda. Minutes approved as amended.

(b)(6)

**Identify Projects**

(b)(6) indicated that there are no new projects right now.

**ICC Continuation Manual**

(b)(6) reported that we have received three of the submissions so far. (b)(6) identified the four sections as: Overview; Social Media; TAP Newsletter; and Facebook. (b)(6) will review her messages to determine if she has them all. (b)(6) explained to (b)(6) that she would in affect create the manual from the four sections that she is going to receive and allow the committee to review the final product. The committee will review the manual after (b)(6) puts it all together.

**Newsletter**

(b)(6) indicated that the committee does not have to worry about the length of the articles for the newsletter as the editors will work on that. Jimerson spoke about the November newsletter and how it might be longer than usual since it will be wrapping up the TAP year. The committee will try to continue the newsletter during the December and January months in between the beginning of the next TAP year.

**Facebook**

(b)(6) will forward the information on to the committee very soon.

**Social Media**

**Final Thoughts**

(b)(6) reminded the committee to make sure they are posting outreach or interesting links on the social media sites as needed. Jimerson wanted everyone to think about what products will they be passing on to the committee for next year. Jimerson indicated that the continuation manual is a great example of this. Jimerson would like to discuss that subject during the next meeting. (b)(6) would like edits or suggestions to be provided for the continuation manual prior to the meeting so we can have a good discussion about this project.

**Action Items**

ICC Continuation Manual:

- Confirm links on Social Media document
- FB information being sent today

Products to handoff to 2018 ICC – next month's agenda item and items for them to work on.

**Closing**

Jimerson thanked all for attending and closed the call.

**The Next Internal Communications Meeting is tentatively scheduled for:  
November 14, 2017 Call –In Number: 1-888-331-8226 AC**



**Internal Communications Committee (ICC)  
Meeting Minutes  
Tuesday, November 14, 2017**

(b)(6)

**Members Present**

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(b)(6)

**Members Absent**

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**Staff Members**

- Lisa Billups
- Susan Jimerson
- Gilbert Martinez
- Rosalind Matherne
- Matthew O'Sullivan
- Robert Rosalia
- Antoinette "Toni" Ross
- Otis Simpson
- Fred Smith
- Gretchen Swayzer

(b)(6)

**Welcome/Open Meeting**

Jimerson opened the call and welcomed everyone to the meeting. Jimerson announced that (b)(6) retired and about replacing him on the Newsletter team.

**Review Agenda and Minutes**

Martinez reviewed the agenda and spoke about two possible projects for next year: Standardizing TAP email addresses and redesigning the TAP business cards. Minutes approved as amended.



(b)(6)

### **ICC Continuation Manual- Review and Approve**

There were several grammatical and formatting corrections sent to Martinez prior to the meeting. [redacted] inquired about the designation Facebook Page and Facebook public group since they could cause some confusion. This is the TAP Facebook Group Page. Clarification provided about both group administrators and their permissions to indicate that one should be point for approving friend requests. They both can accept, but one administrator will be the point person for this process.

The committee collectively reviewed the document and made several format and grammatical corrections to the document. The main purpose for this document is to help members complete outreach virtually and make it easier to new and returning members. Martinez will create a Content Library on [www.tapspace.org](http://www.tapspace.org) as part of this project. The Newsletter section was updated with grammatical and formatting changes as well as new ideas and clarifications. Martinez will make a final review of this project and send it out to the committee to be finalized.

### **Overview**

This section was reviewed and updated with several grammatical and formatting corrections.

### **TAP Newsletters in November and December**

The off months will include information about retiring members, when the new members are approved, training and when the TAP year is going to start. This would make it very helpful for the returning members.

### **Virtual Outreach Tips and Tools**

This section was reviewed and updated with several grammatical and formatting corrections.

### **Action Items**

- Newsletter – Replace J [redacted].
- [redacted] will send out a solicitation to all TAP members to find any interested volunteer(s).
- Develop Content Library for Social Media Posting.

### **Final Thoughts**

[redacted] thanked Hower for stepping up to lead the committee and Martinez for helping to guide this committee to accomplish so much. [redacted] thanked the committee for all the work they did this year. Jimerson thanked everyone and acknowledged the collaboration with the Outreach Committee to get things done this year.

### **Closing**

Jimerson thanked all for attending and closed the call.