

## 2025 Current Fiscal Year Report: IRS Taxpayer Advocacy Panel

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### 1. Department or Agency

Department of the Treasury

### 2. Fiscal Year

2025

### 3. Committee or Subcommittee

IRS Taxpayer Advocacy Panel

### 3b. GSA Committee No.

5217

### 4. Is this New During Fiscal Year?

### 5. Current Charter

### 6. Expected Renewal Date

### 7. Expected Term Date

No 02/12/2024 02/12/2026

### 8a. Was Terminated During Fiscal Year?

No

### 8b. Specific Termination Authority

### 8c. Actual Term Date

### 9. Agency Recommendation for Next Fiscal Year

Continue

### 10a. Legislation Req to Terminate?

No

### 10b. Legislation Pending?

Not Applicable

### 11. Establishment Authority

Agency Authority

### 12. Specific Establishment Authority

Agency Decision

### 13. Effective Date

10/10/1997

### 14. Committee Type

Continuing

### 14c. Presidential?

No

### 15. Description of Committee

Non Scientific Program Advisory Board

### 16a. Total Number of Reports

No Reports for this Fiscal Year

### 17a. Open

11

### 17b. Closed

0

### 17c. Partially Closed

0

### Other Activities

0

### 17d. Total

11

## Meetings and Dates

Purpose	Start	End
Taxpayer Assistance Center Monthly meeting	10/08/2024	10/08/2024
Special Projects Committee Monthly meeting	10/09/2024	10/09/2024
Taxpayer Communications Committee Monthly meeting	10/10/2024	10/10/2024
Toll Free Phone Lines Committee Monthly meeting	10/10/2024	10/10/2024
Tax Forms & Publications Committee Monthly meeting	10/10/2024	10/10/2024

Notices & Correspondence Committee	10/16/2024 - 10/16/2024
Monthly meeting	
Joint Committee Monthly meeting	10/24/2024 - 10/24/2024
Notices & Correspondence Committee	11/12/2024 - 11/12/2024
Monthly meeting	
Special Projects Committee Monthly meeting	11/13/2024 - 11/13/2024
Tax Forms & Publications Committee	11/14/2024 - 11/14/2024
Monthly meeting	
Joint Committee Monthly meeting	11/21/2024 - 11/21/2024

**Number of Committee Meetings Listed: 11**

	<b>Current</b>	<b>Next</b>
	<b>FY</b>	<b>FY</b>
<b>18a(1). Personnel Pmts to Non-Federal Members</b>	\$0.00	\$0.00
<b>18a(2). Personnel Pmts to Federal Members</b>	\$0.00	\$0.00
<b>18a(3). Personnel Pmts to Federal Staff</b>	\$0.00	\$0.00
<b>18a(4). Personnel Pmts to Non-Member Consultants</b>	\$0.00	\$0.00
<b>18b(1). Travel and Per Diem to Non-Federal Members</b>	\$0.00	\$0.00
<b>18b(2). Travel and Per Diem to Federal Members</b>	\$0.00	\$0.00
<b>18b(3). Travel and Per Diem to Federal Staff</b>	\$0.00	\$0.00
<b>18b(4). Travel and Per Diem to Non-member Consultants</b>	\$0.00	\$0.00
<b>18c. Administrative Costs (FRNs, contractor support, In-person/hybrid/virtual meetings)</b>	\$0.00	\$0.00
<b>18d. Other (all other funds not captured by any other cost category)</b>	\$0.00	\$0.00
<b>18e. Total Costs</b>	\$0.00	\$0.00
<b>19. Federal Staff Support Years (FTE)</b>	0.00	0.00

**20a. How does the Committee accomplish its purpose?**

The mission of the Taxpayer Advocacy Panel (TAP) is to listen to taxpayers, identify taxpayers' issues and make suggestions for improving IRS service and customer satisfaction. The TAP works with the Taxpayer Advocate Service (TAS) and the IRS Wage & Investment and Small Business/Self Employed operating divisions to identify strategic initiatives, products, or services that need or will benefit from citizen input. The operating divisions utilize TAP to gain pre-decisional input on products, services or strategic initiatives or key program changes that impact taxpayers. The TAP works on topical projects and identifies and analyzes grass-root level issues received from taxpayers and elevates them to the IRS with recommendations for improvement. The focus of the TAP is identifying and working on service-wide issues. This aligns with the modernized IRS organization, which has moved to a more service-wide program focus. The TAP solicited and received direct taxpayer input through their committee web site, dedicated toll-free telephone line, member outreach and open meetings. The TAP has direct access to IRS operating divisions and the National Taxpayer Advocate. IRS liaisons serve as the TAP's link to the Operating Divisions.

**20b. How does the Committee balance its membership?**

The Panel is demographically balanced with representation from each state, the District of Columbia, Puerto Rico and internationally. Recruitment strategies are designed to attract a diverse population. Efforts are made to balance the Panel by gender, ethnicity, socio-economic status and occupations ensuring representation from both wage earners and those who are self-employed. In an effort to maintain this balance

and to ensure continuity, Panel members are appointed to staggered three-year terms with approximately one-third of the members being replaced annually.

**20c. How frequent and relevant are the Committee Meetings?**

Frequency: The Panel committees meet monthly via conference call. In addition, each committee has one face-to-face meeting annually, budget permitting. Relevance: Since there is a continuing need for taxpayer input on improving IRS service and customer satisfaction, the Panel serves as an advisory body to the IRS. As mentioned previously, the Panel provides a citizen voice regarding tax administration. The members have provided valuable input on a variety of issues facing the IRS such as Taxpayer Experience, IRS Future State, Taxpayer First Act, Taxpayer Assistance Centers, Toll-Free assistance, online options, U.S taxpayers living abroad, various tax forms and publications and IRS Notices and Correspondence.

**20d. Why can't the advice or information this committee provides be obtained elsewhere?**

The Panel is composed of citizens from all walks of life, ethnically diverse, and each state has at least one representative. There are other groups such as tax attorneys; accountants and enrolled agents that are able to communicate with the IRS through their professional associations or other advisory committees. These groups provide valuable input and insight to tax administration but they are one perspective. The average citizen does not have a collective voice to communicate with the IRS. The Taxpayer Advocacy Panel fills that void. The Panel is structured so that individual panel members can raise grassroots issues from

citizens to the IRS. Panel members are also part of subcommittees working with various IRS operating divisions to address problems that affect the average taxpayer. Some of the issues being addressed by these subcommittees are, Taxpayer Assistance Centers, Forms & Publications, Notices, Toll-Free lines, and Taxpayer Communications. The perspective these citizens bring could not be gained through any other means and is essential to improving IRS products and services and reducing the burden for America's taxpayers.

**20e. Why is it necessary to close and/or partially closed committee meetings?**

N/A.

**21. Remarks**

The mission of the Taxpayer Advocacy Panel (TAP) is to listen to taxpayers, identify taxpayers' issues, and make suggestions for improving IRS service and customer satisfaction. The Panel is composed of citizens from all walks of life, demographically diverse with each state, the District of Columbia and the Territory of Puerto Rico having at least one representative. Beginning with the start of TAP 2012 year, the panel was divided into six Project Committees (subcommittees) working with IRS program owners on specific issues that potentially affect all taxpayers. The projects were jointly identified by the IRS operating divisions based on strategic objectives and the TAP Joint Committee based on grass-roots issues. The recommendations that arise from the subcommittees must be voted on and accepted by the Joint Committee before being submitted to the IRS. The Project Committees are:

- Taxpayer Communications Committee
- Notices and Correspondence Committee
- Tax Forms and

Publications Committee • Taxpayer Assistance  
Centers Committee • Toll Free Phone Line  
Committee • Special Projects Committee The  
Chairs of each committee along with the TAP  
Chair and Vice-Chair make up the TAP Joint  
Committee which acts on behalf of all TAP  
members to advance the TAP mission. TAP will  
continue to operate using the six subcommittees,  
which report to the Joint Committee.

## Designated Federal Officer

Shawn Collins Director, Taxpayer Advocacy Panel

Committee Members	Start	End	Occupation	Member Designation
Almeida, Melanie	12/01/2022	11/30/2025	Human Resources	Representative Member
Bauzon, Jackson	12/01/2023	11/30/2026	Vice President - Payroll Tax	Representative Member
Bell, Richard	12/01/2021	11/30/2024	Retired Navy	Representative Member
Birdsong, Shequeila	12/01/2021	11/30/2024	Department of Labor	Representative Member
Brinkley, Jason	12/01/2022	11/30/2025	Attorney	Representative Member
Brookens, Michelle	12/01/2022	11/30/2025	Land of Lincoln Workforce Alliance	Representative Member
Calloway, Robert	12/01/2023	11/30/2026	CPA	Representative Member
Choder, Howard	12/01/2023	11/30/2026	Retired	Representative Member
Cloyd, Stacy	12/01/2023	11/30/2026	Federal Government	Representative Member
Colvin, Alice	12/01/2023	11/30/2026	RAISE Texas	Representative Member
Crispin, Jason	12/01/2023	11/30/2026	Professor	Representative Member
Crowe, Cheryl	12/01/2021	11/30/2024	Realtor	Representative Member
Diaby, Aissata	12/01/2022	11/30/2025	New York Life Insurance Company	Representative Member
Dickey, Ellen	02/02/2023	11/30/2025	CPA	Representative Member
Dominguez, Manuel	12/01/2022	11/30/2025	Enrolled Agent	Representative Member
Earwood, Anthony	06/06/2022	11/30/2025	Drug Enforcement Administration	Representative Member

Fritz-Gerald, Delice	04/25/2024	11/30/2026	Tax Practitioner	Representative Member
Gelb, Joel	12/01/2022	11/30/2025	CPA	Representative Member
Gerstein, Mitchell	12/01/2023	11/30/2026	CPA	Representative Member
Grayson, Tiffany	12/01/2023	11/30/2026	Voorhees University	Representative Member
Guthridge, Kameelah	12/01/2021	11/30/2024	Ohio Small Business Development Center	Representative Member
Hall, Steven	12/01/2022	11/30/2025	Enrolled Agent	Representative Member
Halleman, Daniel	12/01/2023	11/30/2026	Retired	Representative Member
Harvey, Charles	12/01/2021	11/30/2024	US Department of Labor	Representative Member
Hoffman, Steven	12/01/2021	11/30/2024	Tax Advisor	Representative Member
Hwang, Philip	12/01/2023	11/30/2026	Optima Tax Relief	Representative Member
Jude, Jihan	12/01/2023	11/30/2026	Tax Attorney	Representative Member
Kipple, Kyle	12/01/2023	11/30/2026	Boy Scouts of America	Representative Member
Kurita, Debra	12/01/2021	11/30/2024	Retired Public Administrator	Representative Member
Lammers, Rebecca	12/01/2021	11/30/2024	Music Executive	Representative Member
Lawler, Mary	12/01/2023	11/30/2026	Quality Assurance Director	Representative Member
Lefevre, Jared	12/01/2021	11/30/2024	Department of Defense	Representative Member
Lowman, LaRee	12/01/2023	11/30/2026	Human Resources	Representative Member
Madison, Angela	12/01/2021	11/30/2024	State of California	Representative Member
McCracken, Shelley	12/01/2021	11/30/2024	HUD	Representative Member
Miller, Jean	12/01/2021	11/30/2024	State of Connecticut	Representative Member
Mosley, Robin	12/01/2021	11/30/2024	Retired Senior Logistician	Representative Member
Newingham, David	12/01/2021	11/30/2024	Tax Preparation	Representative Member
Parampathu, Joseph	03/13/2023	11/30/2025	Aviation Safety	Representative Member
Payton, Alisha	02/29/2024	11/30/2026	Project Manager	Representative Member
Rodgers, John	12/01/2023	11/30/2026	CPA	Representative Member

Rodriguez, Richard	12/01/2021	11/30/2024	FBI Joint Terrorism Task Force	Representative Member
Simpson, Jim	12/01/2023	11/30/2026	CPA	Representative Member
Sklar, Steven	12/01/2022	11/30/2025	Tax Attorney	Representative Member
Slaney, Charles	12/01/2022	11/30/2025	Transportation Oregon	Representative Member
Smith, Candace	12/01/2021	11/30/2024	Senior Customer Experience Analyst	Representative Member
Stewart, Michael	12/01/2023	11/30/2026	Military - Retired	Representative Member
Thompson, Patricia	12/01/2021	11/30/2024	Tax Partner	Representative Member
VanOrden, Jantel	12/01/2022	11/30/2025	Accountant	Representative Member
Webster, Walter	12/01/2023	11/30/2026	Auditor	Representative Member
Williams, George	12/01/2021	11/30/2024	Tax Return Preparer	Representative Member
Williamson, Donald	12/01/2023	11/30/2026	Professor	Representative Member
Wiseman, James	06/07/2022	11/30/2025	CPA	Representative Member

**Number of Committee Members Listed: 53**

### **Narrative Description**

The TAP supports the mission of providing America's taxpayers with top quality service and helping them understand and meet their tax responsibilities by providing a taxpayer perspective to the IRS on critical tax administration programs. It does this by submitting recommendations to the IRS to address grass-root issues received from taxpayers. Prior to submission issues are prioritized, researched, documented and ultimately raised to the program owners for consideration. TAP members also work with IRS program owners on assigned tasks or projects and present recommendations for consideration. These processes directly support the mission and strategic plan of the IRS. The committee's operating procedures changed for the 2012 TAP year with the elimination of Area committees working individual issues.

**What are the most significant program outcomes associated with this committee?**



Checked if  
Applies

Improvements to health or safety	<input type="checkbox"/>
Trust in government	<input checked="" type="checkbox"/>
Major policy changes	<input type="checkbox"/>
Advance in scientific research	<input type="checkbox"/>
Effective grant making	<input type="checkbox"/>
Improved service delivery	<input checked="" type="checkbox"/>
Increased customer satisfaction	<input checked="" type="checkbox"/>
Implementation of laws or regulatory requirements	<input type="checkbox"/>
Other	<input type="checkbox"/>

### Outcome Comments

NA

### What are the cost savings associated with this committee?

Checked if Applies

None	<input type="checkbox"/>
Unable to Determine	<input checked="" type="checkbox"/>
Under \$100,000	<input type="checkbox"/>
\$100,000 - \$500,000	<input type="checkbox"/>
\$500,001 - \$1,000,000	<input type="checkbox"/>
\$1,000,001 - \$5,000,000	<input type="checkbox"/>
\$5,000,001 - \$10,000,000	<input type="checkbox"/>
Over \$10,000,000	<input type="checkbox"/>
Cost Savings Other	<input type="checkbox"/>

### Cost Savings Comments

While actual dollar savings have not been determined, the program places emphasis on improving customer service, increasing satisfaction, and reducing taxpayer burden. The TAP recommendations encourage the IRS to take actions to improve these areas in the most cost efficient manner. While cost savings for taxpayers or the government is not a concrete figure, we continue to explore measures to assess the value of the panel's recommendations to the IRS and taxpayers.

**What is the approximate Number of recommendations produced by this committee for the life of the committee?**

**Number of Recommendations Comments**

For recommendation purposes the TAP operates on a calendar year ending in December, not a fiscal year. Since the 2024 TAP year is not complete when the FACA database reporting for FY 2024 is due, this report includes recommendations through December 2023, which is the most current TAP year data available. This is consistent with the TAP Annual Report for 2023 which is the last report available at the time the FACA reports are closed for FY 2024. From its creation in 2002, TAP has forwarded a total of 3169 recommendations to the IRS. The IRS seriously considers the TAP recommendations, however at times it is limited in its ability to implement them due to the cost of implementation, legislative or regulatory restrictions, a difference on philosophy or the honest trade-off between easing the taxpayer's burden to understand and meet their tax responsibilities while efficiently collecting the proper tax revenues owed. Information on these recommendations is contained in the TAP Annual Reports. You can find the detailed reports of TAP's accomplishments on the TAP website.

**What is the approximate Percentage of these recommendations that have been or will be Fully implemented by the agency?**

25%

**% of Recommendations Fully Implemented Comments**

This calculation includes responses from IRS indicating the recommendation has been accepted or implemented. Until 2011 the TAP did not have a system in place to follow up on the recommendations accepted or partially accepted by the IRS to determine if they were implemented. The majority of the accepted recommendations were elevated to the IRS from Area committees via the formal recommendation elevation process. Note: Project committees provide input from TAP members to IRS program owners on projects, products or services assigned to the committee. This process provides immediate input to the IRS for consideration. Since TAP may be one of many stakeholders, IRS often considered TAP's recommendations without providing a formal acceptance or rejection. Approximately 25 percent of TAP's recommendations would fall into this category in which TAP's recommendations were considered by the IRS but a determination of the outcome attributed to the TAP recommendation is not known.

**What is the approximate Percentage of these recommendations that have been or will be Partially implemented by the agency?**

9%

### **% of Recommendations Partially Implemented Comments**

This calculation includes responses from the IRS indicating the recommendation has been partially accepted. This includes recommendations consisting of more than one suggestion of which not all were accepted. As stated regarding the percentage of recommendations fully implemented, the ultimate determination of the outcome attributed to the TAP recommendation may not be known for all TAP recommendations.

### **Does the agency provide the committee with feedback regarding actions taken to implement recommendations or advice offered?**

Yes ☒ No ☐ Not Applicable ☐

### **Agency Feedback Comments**

The agency continues to provide feedback through both oral and written communications. In 2010 the TAP added response comments and accepted/rejected fields to the TAP Recommendation Referral Form to make it easier for the IRS to provide feedback on TAP recommendations.

### **What other actions has the agency taken as a result of the committee's advice or recommendation?**

Checked if Applies

Reorganized Priorities	<input checked="" type="checkbox"/>
Reallocated resources	<input checked="" type="checkbox"/>
Issued new regulation	<input checked="" type="checkbox"/>
Proposed legislation	<input type="checkbox"/>
Approved grants or other payments	<input type="checkbox"/>
Other	<input checked="" type="checkbox"/>

### **Action Comments**

The agency has taken action based on input and recommendations from the TAP in various ways. Most of the IRS actions taken in response to TAP's recommendations relate to improved tax products, forms, publications, notices and correspondence.

### **Is the Committee engaged in the review of applications for grants?**

No

### **Grant Review Comments**

NA

### **How is access provided to the information for the Committee's documentation?**

Checked if Applies

Contact DFO	<input checked="" type="checkbox"/>
Online Agency Web Site	<input checked="" type="checkbox"/>
Online Committee Web Site	<input checked="" type="checkbox"/>
Online GSA FACA Web Site	<input checked="" type="checkbox"/>
Publications	<input checked="" type="checkbox"/>
Other	<input checked="" type="checkbox"/>

**Access Comments**

Toll-Free phone line 1-888-912-1227