

## **IRS Oversight Board**

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### **IRS OVERSIGHT BOARD MEETS WITH TAX PRACTITIONERS, IRS EMPLOYEES IN KANSAS CITY Training Front-Line Employees a Pressing Issue; Special Session Planned**

The IRS Oversight Board met with IRS employees and local tax practitioners from the Kansas City area at its July 26th meeting, which was held at the IRS Overland Park facility. The purpose of the meeting was for the Board to discuss plans on the Kansas City Campus consolidation, and listen to the concerns of those who work for or interact with the tax agency regularly.

“The Board is enormously grateful for those at the IRS Overland Park facility who welcomed us, provided an excellent overview of their operations, and shared their views and insights in improving an already excellent center,” said Chair Nancy Killefer.

The Kansas City office is in the first phases of consolidating eight of its workplaces into one in a renovated and updated facility, located in Kansas City, Missouri. The Board reviewed the site plans. Groundbreaking is expected later this year, with completion slated for 2007.

At two roundtable meetings, the Board met with IRS employees and with local tax attorneys, accountants, enrolled agents and tax preparers. Also present were representatives from the Taxpayer Advocacy Panels and local low-income tax clinics. Among the issues raised was IRS training for its front-line personnel. Both IRS employees and practitioners told the Board that current training is ineffective for some front-line employees. Employees felt they did not receive enough pertinent training for their jobs, while tax practitioners complained that answers to their questions are sometimes inaccurate.

“The IRS Kansas City center deserves real credit for its enormous productivity in key areas,” said Chair Nancy Killefer. “However, the IRS must ensure a quality workplace for all of its personnel; particularly its front-line employees who interact regularly with taxpayers. The Board has noted in its annual reports and congressional testimony that training at the IRS does not get the amount of attention it needs as the agency continues to modernize. Opportunities for peer training, mentorships, and team-building exercises are proven best practices in our nation’s successful customer-driven companies. Such one-on-one training could benefit not only IRS employees, but their customers – American taxpayers.”

A special session with IRS business division managers to discuss IRS training is scheduled for September 24th in Washington, DC. The meeting will be chaired by Raymond T. Wagner, Jr., who heads the Board's Human Capital Committee.

*No Consensus on Registering Tax Preparers*

Tax practitioners views on registering preparers were mixed at the Board's roundtable discussion. Currently, not all tax preparers are required by the IRS to meet specific standards or be registered to prepare tax returns. While all practitioners at the meeting voiced concern over preparers who make mistakes or file questionable returns for clients, there was no consensus on how to address the problem. Some advocated testing and registering preparers, while other felt outside professional societies should set and enforce professional standards.

The Board will continue to gather views on the topic as it participates in Nationwide Tax Forums, which are sponsored by the IRS and are held in the summer at cities throughout the U.S. The forums help thousands of practitioners stay up to date on trends and IRS services.

*IRS Posts BSM Progress*

The IRS reported to the Board that its Customer Account Data Engine version 1.1 was launched and successfully processed a batch of 1040EZ returns.

"While this is a first step, it is an important one," said Board Business Transformation Chairman Larry R. Levitan. "The next hurdle is to prepare the system for next year's filing season. While the BSM program is not out of the woods, the Board was pleased to hear good news."

*Next Meeting Scheduled*

The Board's next meeting will be September 13-14, 2004 in Washington, DC. At this meeting, the Board will focus on planning its agenda for FY2005. In addition, Nancy Killefer's term as the Board's chair will expire, and a new chairman will be elected.