



California State Board of Equalization

BOARD WORK GROUP: VETERANS' EXEMPTION, DISABLED VETERANS' EXEMPTION, AND HOMEOWNERS' EXEMPTION MEETING

450 N Street, Auditorium, Sacramento

Tuesday, July 25, 2023

AGENDA

Convene – This Board Work Group Meeting Convenes upon recess of the Board Meeting

Call to Order

1. Greetings and Introductory Remarks.....Mr. Vazquez / Ms. Lieber

This Board Work Group (BWG) will take up specific topics and issues regarding the Veterans' Exemption, Disabled Veterans' Exemption, and Homeowners' Exemption for fact-finding, investigation, and discussion. The BWG will solicit input from a broad range of stakeholders, including, but not limited to state and local government agencies, County Assessors, veterans and homeowners' nonprofit organizations, and all individuals and interested parties. Upon the conclusion of all meetings, the BWG will report back to the Board with recommendations for possible actions.

Speakers:

Hon. Antonio Vazquez, Co-Chair,
Member, Third District

Hon. Sally Lieber, Co-Chair,
Member, Second District

2. Overview, history, and current benefit of each exemption and qualification and eligibility for eachMr. Vazquez / Ms. Lieber

a. BOE overview of the exemptions, responsibilities, general data.

Speakers:

Yvette Stowers, Executive Director, BOE

David Yeung, Deputy Director, Property Tax Department,
BOE

b. County Assessors overview of the exemptions, responsibilities, general data.

Speaker: Hon. Kristine Lee, President, California Assessor's Association (CAA); and Kings County Assessor-Recorder-Clerk

3. Current Challenges and Issues from State and Local Government Perspective

a. Veteran's and Disabled Veterans' Exemptions

Speaker: Jim Zenner, Director, Military & Veterans Affairs,
County of Los Angeles

b. Homeowners' Exemption

Speakers: TBD

4. Current Challenges and Issues from Nonprofit Advocacy, Educational, and Financial Organizations' Perspective

a. Veteran's and Disabled Veterans' Exemptions

Speakers: Diana Love, Secretary, California Democratic Party and Chair of the Policy and Legislation Committee for the Veterans Caucus

Rev. Reuben Ford (Retired Pastor) and Member, Policy and Legislation Committee, California Democratic Party

Dana Nichol, Legislative Advocate for Veterans Service Organizations, Reeb Government Relations

b. Homeowners' Exemption

Speaker: Scott Kaufman, Legislative Director, Howard Jarvis Taxpayers' Association

5. Wrap-Up and Next Steps

Identify for future Work Group meetings and discussion issues of concern and matters not fully addressed.

a. California Assessors Association

Speaker: Hon. Kristine Lee, President, CAA; and
Kings County Assessor-Recorder-Clerk

b. Board Members

Speakers:

Hon. Antonio Vazquez, Co-Chair,
Member, Third District

Hon. Sally Lieber, Co-Chair,
Member, Second District

Hon. Ted Gaines, Member, First District

Hon. Mike Schaefer, Member, Fourth District

Hon. Malia M. Cohen, State Controller, represented by
Deputy State Controller, Hasib Emran

Adjourn Board Work Group

Board Work Group Meeting Agenda Changes

The following is a list of each change to the agenda, including the date of change, item number, item name and description of change.

07/21/23 | 2 | Overview, history, and current benefit of each exemption and qualification and eligibility for each | Speakers Added

07/21/23 | 3 | Current Challenges and Issues from State and Local Government Perspective | Speakers Added

07/21/23 | 4 | Current Challenges and Issues from Nonprofit Advocacy, Educational, and Financial Organizations' Perspective | Speakers Added

07/21/23 | 5 | Wrap-Up and Next Steps | Speakers Added

07/24/23 | 4 | Current Challenges and Issues from Nonprofit Advocacy, Educational, and Financial Organizations' Perspective | Speakers Updated