



BOARD OF EQUALIZATION

**CUSTOMER SERVICES AND ADMINISTRATIVE  
EFFICIENCY COMMITTEE MEETING MINUTES**HONORABLE BILL LEONARD, COMMITTEE CHAIR  
450 N STREET, SACRAMENTO

OCTOBER 6, 2009, 10:30 A.M.

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**ACTION ITEMS & STATUS REPORT ITEMS****Agenda Item No: 1****Title:** Report on In-Person Seminars and Online Educational and Learning Products**Issue/Topic:**

Information regarding the Board of Equalization's in-person seminars and options for transitioning to online seminars.

**Committee Discussion:**

Committee Chair Bill Leonard opened the Committee meeting by introducing the agenda item and asked staff to give a status update of the Board of Equalization's (BOE) in-person seminars and online educational and learning products.

Ms. Anita Gore, Deputy Director, External Affairs Department, introduced herself and Ms. Kari Hammond, Outreach Services Division (OSD), and then gave a report of the Board of Equalization's (BOE) In-Person Seminars and Online Educational and Learning Products.

Ms. Gore reported that last month the committee members asked several questions related to the in-person seminars and virtual seminars being created.

Ms. Gore stated the committee members have been sent materials that address the questions of attendance, use, cost, most common seminars, and the benefits of both in-person and online seminars. She also advised that attached to that information are a transition plan and a marketing plan.

Ms. Gore reported that it is the goal of the OSD to create a virtual seminar and business fair by the end of the calendar year.

Ms. Gore reported that the virtual experience will be created as shown in the document titled, *Small Business Fair and Nonprofit Seminar Online Transition Timeline*. She reported that the OSD took a typical agenda for these events and named the online education and learning product that will address that item and when is the anticipated completion. She also commented that the goal is to replicate in person events through the web in some form.

Ms. Gore explained that in some cases the agenda items will be addressed through a fully produced video. She also commented that in some cases, a PowerPoint presentation with audio will be available and at the very least, written materials will be available.

Ms. Gore introduced a short composite of a voice-over PowerPoint on the issue of AB 71, regarding cigarette tax enforcement.

She stated OSD will work with partners and other participating agencies to place any materials that the BOE does not own onto the BOE virtual seminar website. In addition, links to appropriate publications will be included.

To address the issue of a question and answer capability, the BOE plans to have an email address listed with the seminar materials so taxpayers can ask their questions. She commented that the BOE will commit to forwarding those questions to the appropriate person for response within 48 hours.

Ms. Gore stated that the goal is to create a taxpayer experience that is the next best thing to being there.

Ms. Gore also stated that the virtual seminars are a cost effective alternative. She commented there are some who will prefer the in person experience, but for those who would like to listen to the materials at their leisure and convenience, the BOE plans to offer the virtual alternative.

Ms. Gore commented that the virtual materials will serve to reinforce the seminar experience as well as enhance the breadth of information shared.

She stated that the next item planned for completion is the Taxpayer Rights Advocate (TRA) presentation. She commented that the OSD will plan to demonstrate that item at the November Board meeting.

Ms. Gore stated that following the TRA presentation, the OSD plans to create the Sales and Use Tax Nonprofit Seminar PowerPoint presentation with voice-over. The presentation is available at [www.boe.ca.gov/info/VirtualSeminars/VirtualSeminar\\_online\\_cig\\_tob\\_retail\\_.htm](http://www.boe.ca.gov/info/VirtualSeminars/VirtualSeminar_online_cig_tob_retail_.htm).

Ms. Gore concluded the presentation and asked if there were any questions.

Board Member Betty Yee complimented staff on their efforts. She encouraged staff to continue getting the word out. Ms. Yee commented on the astounding number of views, over 5,000, reported for the online tutorials in the last five months.

Ms. Mandel asked if the number of views represented the number of taxpayers watching the video or just visiting the page. She also asked if the BOE knew whether the views were internal or external to the BOE.

Ms. Gore responded that the BOE does not have that information.

Board Member Michelle Steel thanked the staff for their work and commented that the BOE is heading in the right direction with the online seminars. Ms. Steel stated that she intends to continue to have in-person seminars in her district until the website becomes more convenient to taxpayers. In addition, she commented that the in-person seminars are cost effective; in her district the average cost is \$18.00 per person. She stated that the in-person seminars have value as

one-stop-shop events where taxpayers can get immediate answers to their questions.

Ms. Yee asked if the BOE conducts events on the weekend.

Ms. Gore stated that BOE does not conduct events on Saturday or Sunday.

Ms. Yee asked if there is potential to recast the seminars in terms of scope and content as we transition to online seminars.

Ms. Gore responded that there is potential to recast the seminars by assisting community partners to facilitate the online seminars without having BOE staff present.

Ms. Yee followed up by commenting that one reason she cancelled the events in her district was because of workload issues for auditors. She asked OSD staff to regularly review the scope and content of in-person seminars as more online products become available.

Board Member Jerome Horton asked what percentage of BOE taxpayers were represented in the 5,000 views of the online seminars.

Ms. Gore responded that it is a small percentage of the 860,000 taxpayers.

Mr. Horton asked if a taxpayer can be selective in viewing seminar topics.

Ms. Gore responded that taxpayers can be selective in choosing seminar topics at the in-person events and taxpayers can access the online seminars anytime at their convenience.

Mr. Horton asked if the seminar information is available on the BOE website.

Ms. Gore responded that the information is on the BOE website but not all the information is available in one place.

Mr. Horton commented that he would reserve judgment on this matter, at this time. He stated that he is a strong advocate for live seminars in his district. Mr. Horton commented that the values of in-person seminars include goodwill, increased compliance, and positive relationships between Board Members, district staff, and taxpayers. In addition, he stated that goodwill advances taxpayer self-compliance. He commented that online seminars are an excellent tool but that he is undecided whether they should replace in-person seminars.

Committee Chair Bill Leonard stated that he wants both online and in-person seminars. He commented that he canceled all of his in-person seminars only to balance the budget and looks forward to bringing them back to his district in the future. Mr. Leonard agreed with Mr. Horton's comments regarding the value of in-person seminars. Mr. Leonard commented that there is additional value at these events for taxpayers to interact with the participating agencies, local governments, and chambers.

Mr. Leonard agreed with Ms. Yee that it is cost effective to have online seminars and that they reinforce the information presented at the in-person seminars. Mr. Leonard suggested that webinars, using computer technology that would allow BOE staff to conduct live seminars without traveling from the workplace, may be a cost effective alternative.

Mr. Leonard commented that there are three distinct audiences that attend the seminars:

