



BOARD OF EQUALIZATION

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

FEBRUARY 1, 2007, 9:30 A.M.

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**ACTION ITEMS & STATUS REPORT ITEMS****Agenda Item No: 1****Title:** Taxpayers' Rights Advocate's 2005-06 Property and Business Taxes Annual Report**Issue/Topic:**

Presentation of the *Taxpayers' Rights Advocate's 2005-06 Property and Business Taxes Annual Report* to Members of the Board of Equalization. The Annual Report highlights the Taxpayers' Rights Advocate Office's accomplishments, describes new projects to assist taxpayers, identifies current issues, and provides examples of cases illustrating services provided in the property and business taxes areas.

**Committee Discussion:**

Taxpayers' Rights Advocate Todd Gilman presented the *Taxpayers' Rights Advocate's 2005-06 Property and Business Taxes Annual Report* to the Board. Mr. Gilman noted the inclusion this year of the Taxpayers' Rights Advocate (TRA) Office's vision, mission and goals, and pointed out the new design and layout. Mr. Gilman expressed his appreciation to Taxpayers' Rights Advocate Office staff for upholding and protecting taxpayers' rights. He also thanked the Sales and Use Tax and Property and Special Taxes Departments for their cooperation, which made achievement of this year's accomplishments and the resolution of issues possible.

Mr. Gilman was commended on the Annual Report. Committee members provided the following comments about the contents of the report:

- Committee Chair Bill Leonard pointed out the value provided by the TRA Office's participation in the taxpayer notification project to improve Board hearing correspondence and the TRA Office's implementation of the Tax Appeals Assistance Program. Mr. Leonard also noted the TRA Office does a good job of building bridges with the county assessors and tax collectors.
- Member Michelle Steel requested the TRA Office's toll-free number be included as an option on the automated phone tree in her district as it is in the Second Equalization District. Ms. Steel mentioned her concern regarding confusion on the taxpayer's part about when to file a petition. Mr. Gilman said his office will work with her staff on her concerns.

