



BOARD OF EQUALIZATION

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

JANUARY 15, 2013, 10:00 A.M.

---

**ACTION ITEMS & STATUS REPORT ITEMS****Agenda Item No: 1****Title:** 2013 Annual Education & Outreach Plan**Issue/Topic:**

Presentation of the Board of Equalization Education & Outreach Plan for calendar year 2013. The 2013 plan includes a list of educational events/seminars, new online tools, webinars and educational mailers.

**Committee Discussion:**

Committee Chair Michelle Steel opened the Committee meeting by introducing the agenda item and asked staff to give an update of the Board of Equalization's (BOE) 2013 Annual Education and Outreach Plan.

Mr. Jaime Garza, Deputy Director, External Affairs Department, introduced Ms. Kari Hammond, Division Chief, External Affairs Department, Outreach Services Division.

Ms. Hammond gave a brief summary of the education and outreach activities planned for calendar year 2013.

She reported that the BOE is committed to helping all California businesses and individuals comply with the state's complex and changing tax laws and that OSD will work closely with Board Member offices to develop regional outreach plans to meet taxpayer needs in each Equalization District.

She stated that the regional outreach program is designed to help the BOE communicate to taxpayers that the BOE is a trusted partner who offers fair, effective and efficient public service.

Education outreach activities in 2013 will focus on helping taxpayers understand Use Tax, filing requirements and what is taxable.

Ms. Hammond reported that the BOE is anticipated to sponsor and/or participate in approximately 627 education and outreach events, speaking engagements and taxpayer classes,

that includes 50 BOE sponsored seminars and events; 12 AB 71 Cigarette Tax classes; approximately 250 Speaker's Bureau requests; and approximately 315 Basic Sales and Use Tax and Return Preparation classes.

Ms. Hammond reported that the BOE will enhance education and outreach efforts to help taxpayers increase voluntary compliance by offering a variety of new online and printed educational tools for small businesses, restaurant industries, nonprofit organizations, fire fee, and tax practitioners.

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

Committee Chair Michelle Steel thanked staff for the report.

Board Member Jerome E. Horton thanked staff for the report. He commented that BOE's greatest enforcement tool is education and thanked Committee Chair Michelle Steel for her support. He also thanked Board Member Betty T. Yee for her efforts to make government more efficient.

Board Member George Runner thanked staff for working with each Member to develop regional outreach appropriate to each district. He commented about the importance of being flexible to allow the BOE to properly inform taxpayers and avoid compliance gaps.

Board Member Horton thanked BOE employees for their efficiency in delivering public service.

Committee Chair Michelle Steel adjourned the meeting.

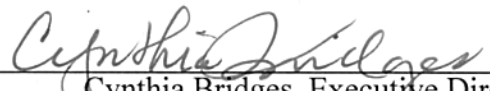
**Committee Action/Recommendation/Direction: None**

**Committee Materials**

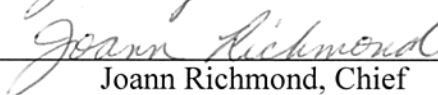
2013 Education and Outreach Plan

Approved:

  
\_\_\_\_\_  
Michelle Steel, Committee Chair

  
\_\_\_\_\_  
Cynthia Bridges, Executive Director

At the January 15, 2013 Board Meeting

  
\_\_\_\_\_  
Joann Richmond, Chief  
Board Proceedings Division