

State Board of Equalization

Outreach Services Division- 2012 Education & Outreach Plan

‘Improving the Taxpayer Experience’

2012 list of events and overview

Outreach Services Division
2012 Outreach Plan & 2011 Event Summary
Improving the Taxpayer Experience

Overview-Calendar Year 2012 Outreach Plan

In 2012 the State Board of Equalization (BOE) will participate in or sponsor 462 events/speaking engagements/classes.

- 33 BOE sponsored seminars/events
- 6 AB71 Cigarette Tax classes
- 8 Professional Development Days
- 165 Speaker's Bureau requests (includes 15 statewide events)
 - 25 State Controller Office seminars
- 250+ Sales and Use Tax and Return Preparation classes

The Outreach Services Division (OSD) will coordinate 212 of the BOE sponsored events/speaking engagements/classes.

- 18 Small Business seminars
- 10 Nonprofit seminars
- 5 Volunteer Income Tax Assistance (VITA) seminars
- 8 Professional Development Days
- 6 AB71 Cigarette Tax classes
- 165 speaker bureau requests
 - 25 State Controller Office seminars

OSD will coordinate 8 percent more events/requests in 2012.

The Basic Sales and Use Tax and Return Preparation classes are sponsored and coordinated by the Sales and Use Tax Department.

2012 Events/Speaking Engagements/Classes

Small Business Seminars (18)

Topics include: Sales and Use Tax, State Enterprise Zones, How to Start a Business, How to Write a Business Plan, State Payroll Issues, Employee vs. Independent Contractor, Federal Tax Updates, Local Business Resources, Marketing Your Business, Home-based Business, How to Avoid Common Sales and Use Tax Problems, Record Keeping, Small Business Contracting Opportunities, How to Finance a Small Business, etc.

Tax Seminars for Nonprofit and Faith-based Organizations (10)

Topics include: Sales Tax, Property Tax Exemptions, State Income Tax-FTB, IRS Form 990, Regulations/Rules for Fundraisers, Employment Taxes, and Income Tax Exemptions
Presenters Include: BOE SUTD, PTSD, IRS, EDD, FTB, and Attorney General's Office.

Professional Development Days (8)

A training program that provides comprehensive education to further the professional development of tax auditors and compliance professionals. Presenters Include: BOE Board Members, Executive Team, District Administrators, BOE Staff

Outreach Services Division- Seminars and Speaker's Bureau

Basic Sales and Use Tax and Return Preparation District Office Classes (250+)

Classes to teach taxpayers how to prepare a sales and use tax return, report exempt sales, use a resale certificate, determine what is taxable and non-taxable labor, and maintain adequate records. (The Sales and Use Tax Department is responsible for these classes.)

Volunteer Income Tax Assistance (VITA) Seminars (5)

Free income tax preparation assistance. Certified tax preparers assist taxpayers who make less than \$49,000 prepare income tax returns.

Participating agencies include: BOE, FTB, IRS, EDD, First Five, Healthy Families, California Lifeline, California Low Cost Auto Insurance Program, and South Bay Workforce Investment Board.

AB71 Cigarette Tax Classes (6)

Interactive classes on its Cigarette and Tobacco Products Licensing program and related tobacco tax laws. The classes are designed to inform, answer questions, and help California sellers of cigarettes and tobacco products understand their requirements and avoid penalties.

Speakers Bureau (165)

These events are sponsored and coordinated by nonprofit or community-based organizations and other local and state agencies. These outside entities invite the BOE to participate at events by providing a speaker, conducting workshops, staffing exhibit tables, and or including information in the event programs.

- Craigslist Nonprofit Boot camp-Berkeley
- Compass Point Nonprofit Conference-Bay Area
- Deloitte Chicago Multistate Tax Summit
- Governor's Small Business Day-Sacramento
- IRS National Tax Forum
- BIC Workshop – Sacramento Works
- IRS/CSE Tax Practitioner Seminar
- Hispanic Chambers Annual Conference-Orange County
- Pan African Global Trade Conference
- Monterey Bay International Trade Assoc.
- Asian Business Association Business Development Day-Orange County
- Asian Expo-Los Angeles
- SBA Sacramento Small Business Forum
- SBA Fresno Small Business Forum
- Women's Small Business Expo-LA

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External Affairs Department & Outreach Services Division

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