

State Board of Equalization

Outreach Services Division- 2013 Education & Outreach Plan

‘Improving the Taxpayer Experience’

2013 overview and list of events

January 10, 2013

Outreach Services Division
2013 Outreach Plan
Improving the Taxpayer Experience

Overview-Calendar Year 2013 Outreach Plan

The Board of Equalization (BOE) is committed to helping all California businesses and individuals comply with the state's complex and changing tax laws.

The Outreach Division will work closely with Board Member offices to develop regional outreach plans to meet taxpayer needs in each Equalization District. The statewide regional outreach goal is to increase voluntary compliance by maximizing the effectiveness of outreach within the four equalization districts in the most effective and cost efficient manner.

In collaboration with each Board Member, the regional outreach program will help the BOE communicate to our customers that we are a trusted partner who offers them fair, effective and efficient public service.

Regional outreach will strengthen and enhance our existing educational efforts by creating and improving strategically valuable relationships with BOE stakeholders and customers.

The mission of the program is to:

1. Create or strengthen cooperative local and regional partnerships with federal, state and local governments, and the various regional stakeholder groups that interact with the BOE, including, but not limited to, economic development agencies, business trade associations, nonprofits, and tax preparers.
2. Collaborate with our partners to identify industry specific or regional compliance barriers and create targeted educational opportunities that will promote and encourage voluntary taxpayer compliance.
3. Deliver key messages from statewide outreach campaigns to regional stakeholders.

Education and outreach activities in 2013 will focus on helping taxpayers understand the complex and changing tax laws related to the following:

- Helping taxpayers understand Use Tax
- Educating taxpayers about permit/license and filing requirements.
 - When do I need a permit or license? How do I eReg?
 - How do I file and pay my BOE taxes?
- Helping taxpayers understand what is taxable.

The Outreach Plan for 2013 will include event/seminars, new online tools, webinars and educational mailers.

Events/Seminars

BOE will sponsor and/or participate in approximately 627 events/speaking engagements/classes.

- 50 BOE sponsored seminars/events
 - 35 Business seminars, including Women's Conference, Restaurant Industry Seminar, and Retail & Trade Conference
 - 10 Nonprofit seminars, including a Faith-Based Funding & Resource Conference
 - 5 Volunteer Income Tax Assistance (VITA) events
- 12 AB 71 Cigarette Tax classes
- 250 Speaker's Bureau requests
- 315 Sales and Use Tax and Return Preparation classes

The Outreach Services Division (OSD) will coordinate 312 BOE sponsored events/speaking engagements/classes. The Basic Sales and Use Tax and Return Preparation classes are coordinated by the Sales and Use Tax Department.

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Online Tools, Webinars, Educational Mailers

BOE will enhance education and outreach efforts to help taxpayers and increase voluntary compliance by offering a variety of new online and printed educational tools.

- New online educational tools (seminars, webinars) for small businesses, restaurant industries, nonprofit organizations, and tax practitioners.
- New educational mailers for small businesses, fire fee, restaurant industry, nonprofit organization, and tax practitioners.
- New E-communications-including links to educational compliance information in BOE standard and routine email communications to permit holders.

Succeeding with the above activities will promote voluntary compliance and increase the positive perception of the value of the BOE key programs and functions among stakeholders, taxpayers and the public.

2013 Events/Speaking Engagements/Classes Descriptions

Small Business Seminars (35)

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.

Basic Sales and Use Tax and Return Preparation District Office Classes (315)

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 qualified taxpayers 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.

AB 71 Cigarette Tax Classes (12)

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.

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Speakers Bureau (250)

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. Below is a list of some of the statewide business conferences/expos that the BOE has historically participated.

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
Pan African Global Trade Conference
Monterey Bay International Trade Assoc.
Asian Business Association Business Development Day
Annual Asian Business Expo-Los Angeles
SBA Sacramento Small Business Forum
SBA Fresno Small Business Forum
Women's Small Business Expo-LA
LACBA Tax Practitioner Conference
League of Cities Annual Conference

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