



Memorandum

To: Honorable Jerome E. Horton, Chairman
Honorable Michelle Steel, Vice Chair
Honorable Betty T. Yee, First District
Honorable George Runner (Ret.), Second District
Honorable John Chiang, State Controller

Date: April 17, 2014

From: Cynthia Bridges
Executive Director

Subject: Media Policy Protocols

Overview

The BOE strives to provide taxpayers, practitioners, and other stakeholders with clear information about our tax laws to promote voluntary compliance and assure tax collection fairness. The BOE has a responsibility to be open and responsive to media information requests because they are among the many avenues to communicate to the public. A key feature of BOE's communication policy is to assure that Board Members maintain a central role in the media communication process.

This memorandum clarifies the BOE's guidelines on media communication to ensure active Board Member review and participation.

Designation of the BOE's Spokesperson

The Deputy Director of External Affairs Department (EAD) is designated as the BOE's principal media contact and spokesperson. Alternate spokespersons include the Executive Director (ED), Board Chair, and Office of Public Affairs (OPA) information officers, if the EAD Deputy Director is unavailable. This office has expertise in media relations and weighs each media inquiry to determine the most effective way to provide information in relationship with confidential or other information that is not yet public. OPA will convey the official BOE position on issues of significance or situations that are particularly controversial or sensitive in nature.

Depending on the situation, issue and location of the media entity, the EAD Deputy Director may direct media contacts to Board Members. The OPA will work with Board Members and their staffs to prepare them for the media interviews as needed. Preparation may include developing talking points, researching questions, and facilitating the interview request.

If a reporter directly contacts any staff person on a BOE issue, the staff person should not answer any questions, but should direct the caller to the OPA for assistance. The OPA is responsible for all media inquiries, and will work to assure that Board Members have the maximum ability to articulate BOE policy.

The following are the categories of typical media communications relevant to BOE operations:

- Interview Requests
- Media Availabilities and News Conferences
- BOE General Information Releases
- Hot Topic Releases
- BOE-Sponsored Event Releases

The following are guidelines for expected issues, communication protocols, and distribution procedures for each of these categories.

GUIDELINES FOR INTERVIEW REQUESTS

Issues: Any BOE related issue or topic requested by the media

Protocols: Requested interviews will be offered in this order:

1. Board Member who represents the city in which the reporter's outlet is based;
2. Board Chair;
3. Deputy Director of External Affairs/Executive Director;
4. OPA Information Officer IIs.

Protocol detail: OPA submits a Media Interview Request form to Board Member Office (BMO). If response is not obtained within a reasonable time frame, the interview will be offered to the next person as indicated above. OPA provides relevant background information and/or data to reporter while awaiting interview request response. If the Board Member conducts the interview, OPA provides background information and other requested support (e.g. talking points and fact sheets). BMO informs OPA when the interview is complete. OPA follows up with reporter to determine other information needs.

Note - OPA provides factual information to reporters, and does not opine on Board policy decisions.

Distribution: As required.

GUIDELINES FOR MEDIA INQUIRIES TO BOE STAFF:

If a reporter directly contacts any staff person on a BOE issue, the staff person should not answer any questions, but should direct the caller to the OPA for assistance. The OPA is responsible for all media inquiries.

GUIDELINES FOR BOE MEDIA AVAILABILITIES AND NEWS CONFERENCES

Issues: In consultation with the ED, OPA identifies BOE related issues or topics of interest to the media to positively promote BOE or address matters of high interest to the public or stakeholders. Examples: criminal enforcement and pending legislation.

Protocols: The opportunity to host the event will be offered to Board Members in this order:

1. Board Member who represents the location where the event will take place (does not include events at BOE Headquarters and Annex facilities);
2. BOE Chair;
3. BOE Vice Chair;
4. Other Board Member.

Protocol Detail: OPA coordinates logistics and issues a media advisory following the General Release protocol. OPA issues news release following the General Release protocol. If a BMO initiates an availability or conference, the BMO will coordinate logistics and inform other BMOs as appropriate. OPA will provide background information, as requested.

Note - All Board Members will be invited to participate in a BOE sponsored media availability/news conference and a Public Agenda Notice may be published depending on BMO attendance.

Distribution: Event can be held at a specific location or via phone/video conference.

GUIDELINES FOR BOE GENERAL INFORMATION RELEASES

Issues: Gasoline Consumption; Taxable sales; Assessment Practices Survey Reports; CEA staff hires; Statewide Compliance and Outreach Program (SCOP); Use tax; Top 500; Sales tax rate changes; TRA Bill of Rights Hearings; Board Meeting agendas; BOE procedures/operations (e.g. online services updates); Relief requests (e.g. during declared disasters).

Protocols:

1. The OPA drafts and clears news release internally with program experts and legal;
2. ED may provide a quote.
3. ED approves for distribution.
4. BMOs will receive the draft release on three-day review.

Note - The Board Chair will recommend the topics and order of presentation for Board Meeting agenda news releases.

If a BMO inserts a quote, but does not adjust the copy of a news release, OPA will be the contact. If a BMO adjusts the copy of a news release, the BMO will be the contact. A BMO edited release will be placed on the Board Member's template and distributed within the Board Member's district.

Distribution: OPA distributes statewide.

GUIDELINES FOR HOT TOPIC RELEASES

Issues: Fuel tax swap; Non-delegated rate adjustments (e.g. Utility Properties); Legislation; Underground Economy; Enforcement/tax evasion; Regulation changes; Fire fee; Headquarters building; Assessed values.

Protocols:

1. OPA drafts and clears news release internally with program experts and legal.
2. ED may provide quote.
3. ED will approve for distribution.
4. BMOs will receive the draft release on three-day review.

If a BMO inserts a quote, but does not adjust the copy of a news release, OPA will be the contact. If a BMO adjusts the copy of a news release, the BMO will be the contact. A BMO edited release will be placed on the Board Member's template and distributed within the Board Member's district.

Distribution: OPA distributes statewide.

GUIDELINES FOR BOE-SPONSORED EVENT RELEASES

Issues: In-person seminars; Tele-town halls; Conferences/events; VITA.

Protocols:

1. OPA drafts and clears news release internally.
2. ED approves for distribution.
3. ED may provide quote.
4. BMOs will receive the draft release on three-day review.

If a BMO inserts a quote, but does not adjust the copy of a news release, OPA will be the contact. If a BMO adjusts the copy of a news release, the BMO will be the contact. A BMO edited release will be placed on the Board Member's template and distributed within the Board Member's district.

Distribution: OPA distributes to media near the event location

GUIDELINES FOR SEEKING MEDIA COVERAGE

In circumstances in which BOE staff believes there is a positive news story to share with the public, contact the OPA. OPA is the only office authorized to distribute the BOE news releases, pitch coverage of particular events, or hold news conferences.

- Do not call or respond to a reporter directly.
- OPA will work with BOE staff to gather information and determine if and how the media should be contacted.
- Some items may be more appropriate for internal communication methods such as the BOE employee newsletter or other forms of employee communications.

Refer all media calls to OPA. Staff should tell the reporter: "The BOE's policy is to refer all media inquiries to the Office of Public Affairs. You can reach them at 916-327-8988."

When taking a call from the media, the same courtesy and professionalism in which BOE staff approaches taxpayers should be displayed toward the media. It is important to contact the OPA immediately when BOE staff are approached by the media to ensure that OPA can meet the reporter's deadline. This is important because the way the call is handled may be the reporter's first impression of the BOE and that first impression may end up in the story published or the news segment broadcast. In order to promote our customer service image, it is important to immediately contact OPA when approached by the media.

GUIDELINES FOR PHOTOGRAPHS AND FILM

A similar process as described above will be used when someone from the media is requesting permission to take photographs or to film inside our facilities. Refer the caller to OPA. No one will be given access to the BOE facility for a photo or filming without approval from OPA and equally important, OPA will not give approval without talking in advance with the manager of the facility. OPA will coordinate the media access. Any employees that do not want to be photographed or videotaped will be given the opportunity to leave the area. OPA will also coordinate with program staff to ensure confidential information is not visible and escort the media outlet in designated areas for the entire visit.

A reporter or camera crew may show up unannounced at your facility. This is most likely to occur in crisis situations at one of our facilities or within one of the communities we serve. Or, it could occur if the media learned about an event at your facility from an external source that has an interest in the BOE's activities.

Please know that OPA will not send the media to any BOE facility without prior discussion with the BOE manager. When dealing with reporters and camera crews who may show up unannounced, the facility manager and staff should act with the same courtesy and professionalism as we approach taxpayers. Contact OPA immediately and let them know which media outlet is present. OPA will contact the media outlet.

BOE cannot prevent the filming or photographing of common areas outside of our facilities which we do not operate. Examples would include public parking lots, courtyards and walk ways.

The following guidelines should be used when television camera crews or print photographers show up unannounced at a BOE facility.

- Although we cannot prevent the media from photographing or filming the exterior of our facilities, contact OPA immediately with the name of the media outlet. OPA will contact the media outlet to see what assistance OPA can provide.
- The media cannot enter the secure areas of a BOE facility to photograph or film without OPA permission.
- The media cannot block the entrance to a BOE facility or prevent people from entering a BOE facility or conducting business as usual.

- OPA can inform the media if taxpayers complain about the inconvenience caused in the parking lot or walkways. OPA may designate someone on site to talk to the media. If so, designees should be courteous and friendly, but also remember that no matter how congenial or affirming the reporter, photographer or camera crew is, everything you say and do may be observed and reported by the media representative.

In the event that a crew from a television or radio station arrives unannounced at the BOE's headquarters building, the first floor receptionist or a security guard will immediately notify the OPA of the news crew's arrival. The OPA is responsible for meeting them in the lobby to determine the purpose of their visit and what information they are seeking.

If a media outlet enters the board room during a meeting in the headquarters building, Culver City, or other location, OPA will interact with the media to determine their needs. If no OPA staff is at the location, the Board Proceedings will contact OPA to determine how to proceed. These are public meetings and media access should never be impeded. If OPA is aware of media present, OPA will inform the Board Members of any media present at Board Meetings.

If a television or radio station crew arrives unannounced at a BOE field office to conduct an interview regarding a BOE-related matter, the District Administrator, Area Administrator, Branch Office Supervisor or most senior office supervisor will ask the OPA how to proceed in these situations; the manager/supervisor should not feel compelled to respond immediately to the media.

If a reporter contacts a field office in advance to request an interview, the reporter will be referred to the OPA. The OPA will work with the media, the appropriate Deputy Director, program management, and District Administrator to determine the best course of action. Due to the significant amount of confidential information found in BOE offices, supervisors must take the following precautions to protect the integrity of the field office operations:

- Allow news cameras only in the public areas of the BOE offices.
- Protect employees from disruption of their work.
- Ensure that information about taxpayers is kept confidential.

CB:ls

cc: Ms. Shellie Hughes
Mr. Joel Angeles
Mr. Alan LoFaso
Mr. Sean Wallentine
Ms. Marcy Jo Mandel