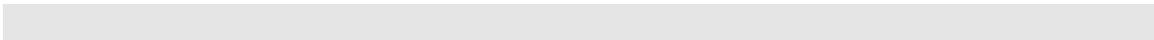


State Board of Equalization

**Outreach Services Division -  
2015 Education & Outreach  
Plan**

*‘Improving the Taxpayer Experience’*

2015 overview and list of events



Outreach Services Division  
2015 Outreach Plan  
*Improving the Taxpayer Experience*

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 and the District Liaisons from the Sales and Use Tax Department (SUTD) 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 2015 will focus on helping taxpayers understand the complex and changing tax laws related to the following:

- Helping taxpayers understand sales and use tax
- Educating taxpayers about permit/license and filing requirements
- Helping taxpayers understand what is taxable
- Encourage taxpayers to utilize agency resources and services

The BOE will enhance education and outreach efforts to help taxpayers and increase voluntary compliance by offering a variety of outreach methods. The Outreach Plan for 2015 will include:

1. Events/Seminars
2. Telephone Townhalls
3. Webinars
4. New Interactive Presentations
5. On the Spot Access to Online Services and Permit Registration
6. Educational Mailers
7. VITA Events

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Events/Seminars

BOE will support and/or participate in approximately 261 outreach events/speaking engagements.

- 72 BOE supported seminars/events
  - 50 Business seminars, including large conferences and industry specific; Restaurant, Connecting Women to Power, International Trade, Health, Wealth, and Wellness
  - 10 Nonprofit seminars
  - 12 Volunteer Income Tax Assistance (VITA) events
- 9 AB71 Cigarette Tax classes
- 180 Speaker's Bureau requests

The Outreach Services Division (OSD) and the Sales and Use Tax Department (SUTD) will coordinate all BOE supported events/speaking engagements.

In 2015, 30 seminars will be conducted via a formal MOU partnership agreement with the Small Business Development Centers (SBDC). The SBDC has a shared interest with the BOE to support business growth and sustainability.

Telephone Townhalls

BOE will host 20 telephone townhalls. A telephone townhall is live phone conference supported by web based technology allowing you to connect to several callers at once. Callers are able to have an exchange with the speakers to ask questions during the townhall. The events are an effective way for the agency to interact with taxpayers from the comfort of their homes or offices.

Webinars

BOE will pilot hosting webinars in 2015. The webinars will be produced by BOE Media with the support of Outreach Services and SUTD.

New Interactive Presentations

BOE will introduce a refreshed Small Business Seminar agenda. The 2015 agenda will increase time allocated on the agenda for the Sales and Use Tax presentation. The new seminar presentation will be more interactive with the taxpayers to allow more time for audience participation. BOE will also present tax return preparation classes at all small business seminars and an opportunity to assist in registering for a permit. Except for Sales and Use Tax Classes in the BOE's four core languages, the BOE will discontinue classes held at district office locations.

On the Spot Access to Online Services

In 2014, the BOE successfully piloted all-in-one touch screen computers at seminars and large expos. The touchscreens allow on the spot access to the BOE and Board Member websites where they can access information about our free resources and services. In 2015, we will add on the spot registration for Seller's Permits at all BOE supported seminars. SUTD will be present at all BOE supported small business seminars to register new taxpayers.

Educational Mailers

The BOE will produce mailers for small businesses, nonprofit organizations, veterans, and tax practitioners.

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VITA Events

BOE will support VITA statewide via regional events, web pages for partner organization VITA sites and services, email campaigns, public service announcements, and marketing materials to include posters with tear offs, brochures, and flyers.

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.

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