



BOARD OF EQUALIZATION
**CUSTOMER SERVICES AND ADMINISTRATIVE
EFFICIENCY COMMITTEE MEETING MINUTES**

HONORABLE BETTY T. YEE, COMMITTEE CHAIR
450 N STREET, SACRAMENTO

APRIL 22, 2014, 10:00 A.M.

ACTION ITEMS & STATUS REPORT ITEMS

Agenda Item No: 1

Title: Open Data Portal

Issue/Topic:

A demonstration of the BOE's effort to improve the public's access to historic statistics and other data that is currently available on the BOE website.

Committee Discussion:

Committee Chair Betty Yee opened the Committee meeting by introducing the agenda item and asked staff to make their presentation.

Ms. Brenda Fleming, Chief Information Officer and Deputy Director of the Technology Services Department introduced Mr. Scott Capulong, Division Chief, Application Development Division, Technology Services Department.

Ms. Fleming described the purpose and benefits of OPEN BOE, the BOE's open data portal service, which is scheduled to go live on May 1, 2014.

Mr. Capulong demonstrated the functions of OPEN BOE, showing how a customer can access the data available.

Ms. Fleming concluded the presentation and stated that OPEN BOE will continue to expand with new features and data.

Committee Chair Betty Yee thanked the staff for the demonstration and stated that OPEN BOE is a great tool to promote transparency, awareness of BOE programs, and make non-confidential data publically available.

Board Member George Runner encouraged the Technology Services Department staff to collaborate with the External Affairs Department staff to make the appropriate audiences aware of this service.

Committee Chair Betty Yee directed staff to contact several targeted audience groups, including

local governments, think tanks, and other interested parties to inform them of OPEN BOE. She also directed staff to seek input from the Board Members on outreach and education priorities.

Ms. Fleming thanked the Board Members and stated they would proceed with outreach and education efforts as indicated.

Agenda Item No: 2

Title: Proactive Outreach Manager (POM)

Issue/Topic:

A report on the pilot of POM, an application that provides pre-recorded messages to tax and fee payers by calling the phone number on their account.

Committee Discussion:

Mr. Jaime Garza, Deputy Director, External Affairs Department, introduced Mr. Thor Dunn, Manager, Customer Services and Publishing Division.

Mr. Dunn stated that the pilot of POM is helping BOE to meet our strategic goal of improving voluntary compliance, by delivering pre-recorded messages to remind them that their returns are due.

Mr. Dunn reported that in October 2013 and again in January 2014, the POM contacted, via telephone, more than 100,000 sales and use taxpayers to remind them that their returns were due. Staff determined that timely filings of the taxpayers contacted by the POM increased by 8 percent. This month, POM is being expanded to include special tax and fee payers.

The POM is currently capable of completing 100,000 phone calls over four business days. Staff is exploring an expansion of the system's capacity, enabling as many as 800,000 calls over 15 business days.

Committee Chair Betty Yee thanked Mr. Dunn for his presentation and asked what other uses of the POM were being considered. She cautioned staff to proceed judiciously.

Mr. Dunn stated the system is being evaluated to enhance BOE's account maintenance efforts and that program experts identify the taxpayers to be called.

Board Member Michelle Steel asked about the response staff have received from customers and stated that some taxpayers may be scared by these calls. She also asked about the cost to use the system and if taxpayers called by the POM are currently able to talk to a live person.

Mr. Dunn stated that the POM is only used during business hours and currently BOE is not incurring additional expenses. The POM expansion will add additional call capability and there is a one-time cost of \$350,000 and ongoing costs of \$27,000 per year. He also stated that taxpayers called currently are provided the BOE website and Customer Service Center phone number, but staff can explore expanding the system to enable interested taxpayers to connect to a live person.

Board Member Jerome Horton encouraged staff to ensure that only business phone numbers are being called by the POM. He directed staff to provide scripts to Committee Chair Betty Yee for her review to ensure the messages are inviting and use appropriate language.

Committee Chair Betty Yee stated the expansion of this program needed more planning, and directed staff to bring the matter back to the Board in May, jointly with appropriate program staff, to provide follow up about which taxpayers are being contacted through the POM and present a timeline for the use and expansion of the POM.

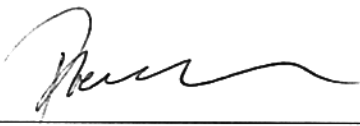
Committee Action/Recommendation/Direction:

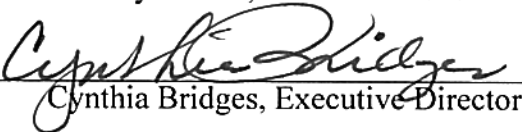
OPEN BOE: Technology Services Department staff were directed to collaborate with the External Affairs Department staff to conduct outreach.

Proactive Outreach Manager: External Affairs Department and appropriate program staff were directed to make a presentation at the May Board Meeting regarding the taxpayers being contacted, and the timeline for the use and expansion of the POM.

Committee Materials

None

Approved: 
Betty T. Yee, Committee Chair


Cynthia Bridges, Executive Director

At the _____ Board Meeting


Joann Richmond, Chief
Board Proceedings Division

STATE BOARD OF EQUALIZATION



BOARD APPROVED

At the April 22, 2014 Board Meeting


Joann Richmond, Chief
Board Proceedings Division