



BOARD OF EQUALIZATION

**CUSTOMER SERVICES AND ADMINISTRATIVE
EFFICIENCY COMMITTEE MEETING MINUTES**HONORABLE BILL LEONARD, COMMITTEE CHAIR
450 N STREET, SACRAMENTO

AUGUST 31, 2009, 9:30 A.M.

ACTION ITEMS & STATUS REPORT ITEMS**Agenda Item No: 1****Title:** Online Tutorial Projects and Virtual Seminars: Status Update**Issue/Topic:**

Online Tutorial Projects Status

Committee Discussion:

Committee Chair Bill Leonard opened the Committee meeting by introducing the agenda item and asked staff to give a status update of the Board of Equalization's (BOE) Online Tutorial Projects.

Ms. Anita Gore, Deputy Director, External Affairs Department, introduced Ms. Kari Hammond, Outreach Services Division, and then gave a status report of the Board of Equalization's (BOE) Online Tutorial Projects.

Ms. Gore reported that the Outreach Services Division (OSD) is creating online opportunities for taxpayers as one way to improve the taxpayer experience and to improve efficiencies.

In 2008, Outreach Services Division, at Board Member request, took the lead and created an enhanced online Sales and Use Tax (SUTD) tutorial.

Ms. Gore stated that currently there are four online tutorials available for taxpayers to use. They are:

- Sales and Use Tax
- Property Tax for Nonprofit and Exempt Organizations
- Sales and Use Tax for Nonprofit and Exempt Organizations
- eFile Video-Registering as an eClient and Filing an Electronic Return

Ms. Gore also stated that these online services have been created using in-house resources. Ms. Gore then introduced a 90-second preview of the new Property Tax for Nonprofit and Exempt Organizations Virtual Seminar. She recognized the efforts of Ken Vaughn, student in the Web

and Media Services Section who produced the new virtual seminar and also thanked Mr. Brian Salmon, BOE Property Tax Appraiser, for acting as the virtual seminar host. She reported that the new tutorial is 13 minutes long and will be posted to the BOE website soon at <http://www.boe.ca.gov/sutax/tpsched.htm>

Ms. Gore reported that the tutorial is the first in a series of online seminar and tutorial projects that OSD will be managing in fiscal year 2009/10.

Ms. Gore also stated that even with budget constraints, and reduction in personnel resources, the OSD will make every effort to continue to meet the online tutorial project timelines for the 2009/10 fiscal year. The projects include:

- AB 71 Cigarette Tax Virtual Seminar –Fall 2009
- Enhanced Sales and Use Tax Nonprofit Virtual seminar –Winter 2009

Ms. Gore also stated that the Work Plan for 2009/10 includes:

- How to Request a Seller's Permit Tutorial
- How to Close Your Seller's Permit Tutorial
- Restaurant Seminar
- Enhanced Sales and Use Tax Tutorial –Audio
- Agricultural Seminar
- Boats and RV Seminar
- Aircraft Seminar

Ms. Gore reported that the completion of these projects will be led by the Outreach Services Division in addition to their existing workload.

In conclusion, Ms. Gore said she would be happy to take any questions from the Board Members.

Ms. Yee thanked Ms. Gore and Ms. Hammond's staff and stated that the new online tutorials are the way BOE should move forward.

Ms. Yee stated that all in-person seminars in her District have been cancelled. She recommended that the OSD redirect all their resources to produce more online seminars. She also commented that to conduct and participate at in-person seminars is not a wise use of resources in the current fiscal environment. Ms. Yee recommended that BOE halt all in-person seminars.

Ms. Gore responded that OSD would comply with the direction from the Board regarding in-person and online seminars.

Mr. Leonard asked about the current outreach efforts to make the taxpayers aware of the online tutorials.

Ms. Gore reported that BOE speakers inform taxpayers of the online resources at all events and speaking engagements. In addition, the information is available on the joint tax agency website, taxes.ca.gov.

Ms. Yee commented that OSD should use the relationships established with trade associations. She stated that in her district there are a lot of associations that are hungry for the information.

Ms. Yee stated she would like to enact a policy to stop all in-person seminars and any other seminars that BOE has a presence. She stated she was unsure of the mechanism.

