



BOARD OF EQUALIZATION

**CUSTOMER SERVICE & ADMINISTRATIVE EFFICIENCY
COMMITTEE MEETING MINUTES**

HONORABLE GEORGE RUNNER, COMMITTEE CHAIR
5901 GREEN VALLEY CIRCLE, CULVER CITY – ROOM 207

FEBRUARY 23, 2016, 9:30 AM

ACTION ITEMS & STATUS REPORT ITEMS

Agenda Item No: 1

Title: 2016 Annual Outreach and Education Plan

Issue/Topic:

Presentation of the Annual Board of Equalization Outreach and Education Plan for 2016.

Committee Discussion:

Committee Chair George Runner opened the Committee meeting.

Taxpayers' Rights Advocate Todd Gilman introduced the agenda item and Trey Luzzi, Manager, Outreach Services Division to present the plan.

Mr. Luzzi presented highlights from the 2016 Outreach and Education Plan.

Ms. Harkey asked if these are in conjunction with the Board Member events and Mr. Luzzi indicated yes, these are inclusive of all BOE events.

Mr. Horton asked if we can include the technology industry to address rapid changes and also monitor new legislation to ensure we educate taxpayers and staff regarding the requirements of new legislation.

Ms. Ma asked regarding the Statewide BOE VITA efforts if BOE employees are completing income tax returns in district offices. Committee Chair Runner clarified that staff are not providing these services during regular business hours but office space is sometimes used to host tax preparation events (i.e. use of a conference room).

Committee Chair Runner asked that property tax be included in the plan under the first list of bullets on page one.

Ms. Ma asked that Restaurants/Bars be included under Key Industries on page 2.

Mr. Horton asked that the plan reflect BOE's efforts to address cultural diversities and language barriers to maximize compliance by non-English businesses. Mr. Luzzi indicated we do have some non-English publications and events. Committee Chair Runner requested the plan reflect that thought.

RECEIVED

MAR 7 2016

TAXPAYER RIGHTS ADVOCATES OFFICE

Mr. Horton clarified that the BOE has been doing webinars for at least 10 years. Mr. Luzzi responded that is correct, and since the end of 2015 BOE now has the ability to host the webinars internally.

Committee Action/Recommendation/Direction:

Committee Chair George Runner accepted the report and thanked Mr. Gilman and Mr. Luzzi for their presentation.

Committee Chair George Runner adjourned the meeting.

Approved: _____



George Runner, Committee Chair



Cynthia Bridges, Executive Director

BOARD APPROVED

At the 2/23/16 Board Meeting



Joann Richmond, Chief
Board Proceeding Division

State Board of Equalization

Outreach Services Division
2016 Education & Outreach Plan

“Improving the Taxpayer Experience”

Overview

February 2016

Outreach Services Division-
2016 Outreach Plan
Improving the Taxpayer Experience

Overview - Calendar Year 2016 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 Services Division (OSD) will work closely with Board Member offices and District Liaisons from the Field Operations Department (FOD) to develop regional outreach plans to meet taxpayer needs in each equalization district. The BOE's goal is to increase voluntary compliance by maximizing the effectiveness of outreach within the four equalization districts in the most efficient and cost-effective manner.

In collaboration with each Board Member, regional outreach plans will help the BOE communicate to taxpayers that it is a trusted partner that delivers fair, effective, and efficient public service.

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

The mission of the program is to:

1. Create and/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, economic development agencies, trade associations, nonprofits, and tax professionals.
2. Collaborate with partners to identify industry specific or regional compliance barriers and create educational opportunities to promote voluntary taxpayer compliance.
3. Deliver key messages from statewide outreach campaigns to regional stakeholders.

Education and outreach activities in 2016 will focus on helping taxpayers understand the complex and changing tax laws by:

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

In 2016, the BOE will continue to identify areas of compliance challenges and opportunities for taxpayers, which will include:

- Key Topics
 - Prepaid Mobile Telephony Services Surcharge
 - Manufacturing and Research and Development Equipment Partial Exemption
 - Lumber Products Assessment
 - Fire Prevention Fee
 - Use Tax (including reporting on Franchise Tax Board (FTB) return)

Outreach Services Division-
2016 Outreach Plan
Improving the Taxpayer Experience

- Key Industries
 - Restaurants/Bars
 - Used Car Dealers
 - Convenience and Liquor Stores
 - Construction Contractors
 - Gas Stations and Mini-Marts
 - Medical Cannabis Retailers
 - Cigarette and Tobacco Retailers
 - Technology

- Key Legislation
 - AB 266 Medical Marijuana Regulation and Safety Act (Chaptered, 2015)
 - AB 1559 Disaster Tax Relief (Introduced 2016, urgency measure)
 - AB 1760 Property Tax: Low Income Housing PILOT Agreements (Chaptered, 2014)
 - AB 1839 Motion Picture Tax Credit (Chaptered, 2014)
 - AB 1907 Use Fuel Tax: Measurement Change (Chaptered, 2014)
 - AB 2231 Property Tax: Senior Citizen & Disabled Citizens Postponement Program (Chaptered, 2014)
 - AB 2681 Counterfeit Goods (Chaptered, 2014)
 - SB 871 Solar Energy Construction Exclusion (Chaptered, 2014)
 - SB 1077 Road Usage Charge Pilot Program—Gasoline Tax Alternatives (Chaptered, 2014)

The BOE will enhance education and outreach efforts in order to increase voluntary compliance by offering a variety of outreach methods, including:

Events/Seminars

BOE will support and/or participate in outreach events/speaking engagements, including BOE supported seminars/events and Speaker's Bureau requests.

The OSD and FOD will coordinate all BOE supported events/speaking engagements.

In 2016, small business seminars will be conducted via a formal Memorandum of Understanding (MOU) partnership agreement with Small Business Development Centers (SBDC). SBDCs have a shared interest with the BOE in supporting business growth and sustainability.

Telephone Townhalls

The BOE will host a number of telephone townhalls, which are live phone conferences supported by web-based technology allowing the BOE to connect to multiple callers at once. Callers listen to speakers and may ask questions during the townhall. These events are an effective way for the BOE to interact with taxpayers from the comfort of their homes or offices.

Webinars

Webinars will be produced by BOE Media Production Services Section with the support of OSD and the Sales and Use Tax Department (SUTD).

Outreach Services Division-
2016 Outreach Plan
Improving the Taxpayer Experience

New Interactive BOE Presentations and Speaker Training

The BOE will launch speaker training workshops focused on improving presentation skills of agency staff to effectively communicate tax and fee information. In addition, new PowerPoint presentations will be created to promote clear audience understanding of tax and fee information.

Speaker's Bureau

The Speaker's Bureau will review and streamline operations to provide agency staff and the public with first class customer service.

Online Seminar Webpages

OSD will work collaboratively within the agency to recommend updates and enhancements to the online seminar webpages.

Strategic Partnerships

BOE staff will proactively build strong partnerships with organizations that also serve to educate and serve new and existing business owners. The focus will continue to be increasing the number of BOE partners in order to distribute and present BOE tax and fee information to their members and customers.

On the Spot Access to Online Services

The BOE will continue to provide on the spot registration for seller's permits at BOE supported seminars. Subject matter experts will be on hand at BOE—supported small business seminars to register new business owners.

Educational Mailers

OSD in conjunction with BOE subject matter experts will continue to create mailers for small businesses, nonprofit organizations, veterans, consumers, and tax practitioners.

Statewide BOE VITA

OSD will continue to support the Volunteer Income Tax Assistance (VITA) program via partnerships with the FTB, Internal Revenue Service, and nonprofit organizations. The BOE will plan, organize, and market the California Earned Income Tax Credit through VITA events and district office tax preparation days.

In all outreach methods BOE will address cultural diversities and provide non-English resources (including publications and events) to promote voluntary compliance among all taxpayers.

Successful outreach and education will promote voluntary compliance and increase the positive perception of the value of BOE key programs and functions among stakeholders, taxpayers, and the public.

Outreach Services Division-
2016 Outreach Plan
Improving the Taxpayer Experience

Outreach Services Division Contact

Manager, Outreach Services Division

Trey Luzzi

450 N Street, MIC 19

Sacramento, CA 95814

Office: 916-324-2507

Cell: 916-616-6778

Email: Trey.Luzzi@boe.ca.gov