



Memorandum

To: Honorable Fiona Ma, CPA, Chairwoman
Honorable Diane Harkey, Vice Chair
Honorable George Runner, First District
Honorable Jerome E. Horton, Third District
Honorable Betty T. Yee, State Controller

Date: January 13, 2017

From: Mark DeSio *Mark*
Executive Director, External Affairs Department

Subject: 2016-17 Education and Outreach Plan

The Board of Equalization (BOE) is committed to helping all Californians understand and comply with the state's tax laws. Historically, the Education and Outreach Plan (Plan) reflected outreach efforts conducted by the BOE's Outreach Services Division. This Division works closely with Board Member offices and Community/District Liaisons to develop regional outreach plans in order to meet taxpayer needs in each equalization district. Additionally, the Plan was based on a calendar year.

We propose the following changes to the Plan:

1. Present the Plan based on a fiscal year rather than a calendar year.
The Fiscal Year 2017-18 Plan will be presented to the Board in May 2017.
2. Present an agency-wide Plan.
Education and outreach is an agency-wide priority, with activities and events organized and facilitated by various program teams throughout the agency. The Fiscal Year 2017-18 Plan will include information on agency-wide education and outreach. See attached for additional information on departmental efforts and various education and outreach methods.
3. Include a budget component.
\$800,000 will be allocated for venue and associated costs, printing, postage, and travel, to conduct the outstanding Fiscal Year 2016-17 education and outreach activities, for Board Member education and outreach efforts.
 - A. Board Members may wish to allocate this amount evenly (\$200,000 per Board Member), or
 - B. Board Members may wish to allocate different amounts to each member.
4. Include information on innovative new solutions that focus on serving the maximum number of people in the most efficient manner. See attached for some planned innovations.
5. Document Board Decisions on policy changes. See attached for information on the Board adopted revised policy on VITA outreach.

The 2017-18 Plan will be drafted based on Board Member direction.

cc: Ms. Genevieve Jopanda
Mr. Russell Lowery
Mr. Sean Wallentine
Ms. Kari Hammond
Ms. Yvette Stowers

State Board of Equalization

Statewide Education and Outreach Plan

January 2017

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GENERAL INFORMATION

BACKGROUND

The Board of Equalization (BOE) is committed to helping all Californians understand and comply with the state's tax laws. The Harris-Katz California Taxpayers' Bill of Rights mandates that BOE "develop and implement a taxpayer education and information program" which must, among other things, reach out to newly registered taxpayers and include mailings, written communication, small business seminars, taxpayer educational materials and continuing education programs targeting common areas of noncompliance and explaining tax compliance in simplified terms (Revenue and Taxation Code (RTC) section 7084).¹ In adopting The Taxpayer Bill of Rights (TBOR), the Legislature made it clear that the California tax system is largely based upon voluntary compliance, and therefore, it was the intent of the legislation to promote voluntary compliance by improving the clarity of tax laws and ensuring the public understand the proper application of those laws. TBOR is contained in 13 RTC statutes, which cover every tax and fee program administered by BOE, many falling under the Fee Collection Procedures Law.²

The Morgan Property Taxpayers' Bill of Rights³ promotes fair administration of property tax with respect to the rights and duties of taxpayers related to taxpayer questions, appeals, and roll changes when errors have occurred. Also, Government Code section 15606 mandates that the Board "prepare and issue instructions to assessors designed to promote uniformity throughout the state and its local taxing jurisdictions in the assessment of property for the purposes of taxation."

As noted in BOE's Strategic Management Plan 2015–2020, our mission is to serve the public through fair, effective, and efficient tax administration. Our core values identify the importance of taxpayer focus, collaboration, integrity, dedication, innovation, and growth and learning. Consistent with our core values, we will:

- Design our communications, products, services, and processes with the taxpayer in mind
- Continue with programs that are successful in improving taxpayer compliance
- Use innovative new solutions that focus on serving the maximum number of people in the most efficient manner

¹ All "section" references are to the Revenue and Taxation Code unless otherwise designated.

² Specific sections related to education are: 7084, 8262, 9262, 30458.2, 32462, 40202, 41162, 43513, 45858, 46613, 50156.2, 55323, 60623.

³ Sections 5900 through 5911.

PURPOSE

One of our Strategic Management Plan goals is to maximize voluntary compliance with the following objectives: improve our understanding of taxpayer needs and expectations, and continually enhance education, outreach, and tools to help taxpayers comply. Consistent with this goal and objectives, the events and activities planned for fiscal year 2016-17, will continue to focus on core educational issues, such as:

- Educating taxpayers about permit, license, and filing requirements.
- Informing taxpayers about how sales and use tax applies to their business operations.
- Informing taxpayers about the 36 other tax and fee programs administered by BOE.
- Communicating with county assessors and state assesses about state and local property tax administration and compliance.

Special attention will also be given to emerging and ongoing issues, including:

- California Marijuana Legalization Initiative (Proposition 64);
- Cigarette and Tobacco Products and Proposition 56;
- Use Tax; and
- Top barriers to voluntary compliance, including:
 - Recorded vs Reported Difference
 - Unsupported Sales for Resale
 - Purchases from Out-of-State Vendors
 - Estimated Sales due to Inadequate Records

The goal of all BOE's Education and Outreach efforts is to maximize voluntary compliance.

STRUCTURE

Education and outreach is an agency-wide priority, with activities and events organized and facilitated by various program teams throughout the agency, including the Business Tax and Fee Department (BTFD), External Affairs Department (EAD), Field Operations Department (FOD), Property Tax Department (PTD), and Board Member offices. Collectively and individually these teams offer a catalog of education and outreach methods.

BUSINESS TAX AND FEE DEPARTMENT

The Business Tax and Fee Department (BTFD), under the leadership of the Deputy Director, provides education and outreach to tax and fee payers in the sales and use tax

and special tax and fee programs. BTFD is responsible for implementing and administering new tax and fee laws and policies pertaining to the various tax and fee programs administered by the BOE. BTFD comprises the Tax Policy, Program and Compliance, Headquarters Operations, and Audit and Motor Carrier Divisions. Each of these divisions plays a role in the various education and outreach activities or components produced by BTFD. Many of the education and outreach activities are required by the Taxpayers' Bill of Rights. Others serve to promote and enhance voluntary compliance and customer service.

Education and outreach conducted by BTFD consists of many activities and various forms of communication:

- Drafts and sends special notices and newsletters to inform tax and fee payers of new or recently amended laws and regulations
- Develops educational and informational material posted online
- Responds to more complex taxpayer questions (calls and written correspondence) forwarded from the Customer Service Center
- Corresponds directly with taxpayers who request specific tax guidance

EXTERNAL AFFAIRS DEPARTMENT

The External Affairs Department (EAD), under the leadership of the Deputy Director, coordinates numerous aspects of education and outreach through the Office of Public Affairs (OPA), the Outreach Services Division (OSD), the Customer Service Center (CSC), and the Media and Publication Services Division (MPSD).

- OPA
 - Handles media inquiries, press releases, and social media
 - Acts as the principal point of contact for the BOE with the news media
 - Ensures the public is informed about the BOE's activities and Board policies regarding administration of taxes and fees
- OSD plans and executes educational seminars and other events
- CSC responds to taxpayer inquiries
- MPSD supports the functional needs of the EAD and the agency by managing the design, printing, and mailing of publications and notices

FIELD OPERATIONS DEPARTMENT

The Field Operations Department (FOD), under the leadership of the Deputy Director, is structured by equalization district, each overseen by an Assistant Chief of Field Operations (ACOF).

Community or District Liaisons/Information Officers (C/DLs) are located in Taxpayer Service Centers (or field offices) and work to increase awareness and educate individuals,

groups and organization about the BOE and the various tax and fee programs it administers. C/DLs connect taxpayers, business advocacy groups, and industry representatives with information and resources to increase voluntary compliance with California's complex tax laws.

The C/DL Program expanded education and outreach efforts. C/DLs work with district management and Board Members' staff to identify and address regional compliance issues with targeted outreach to individual business owners, local chambers of commerce, economic development organizations, industry associations, and other business interest hubs.

C/DLs provide a nexus between FOD and EAD, coordinating and conducting Basic Sales and Use Tax Workshops and Business Resource Seminars; fostering relationships with business associations and local governments; and promoting and providing one-on-one taxpayer service. They also provide community interface and help EAD promote and coordinate seminars, webinars, and telephone townhalls throughout their assigned region.

PROPERTY TAX DEPARTMENT

The Property Tax Department (PTD), under the leadership of the Deputy Director, oversees the assessment practices of the state's 58 county assessors, who are charged with establishing values for approximately 13.5 million properties each year. In addition, PTD assesses the property of regulated railroads and specified utilities, and assesses and collects the private railroad car tax and the timber yield tax. To carry out these functions, PTD has two divisions: County-Assessed Properties Division (CAPD) and State-Assessed Properties Division (SAPD).

The BOE is mandated⁴ to provide information to county assessors and county assessment appeals boards on property taxation issues. CAPD carries out this mandate by issuing instructional Letters To Assessors;⁵ drafting sections of the *Assessors' Handbook*; drafting Property Tax Rules; providing training via classroom sessions, workshops, online training sessions, and webinars; and providing technical assistance to taxpayers, county assessors, and others concerned with property tax issues.

⁴ Government Code section 15606.

⁵ The letters are released by email subscription to approximately 3,500 subscribers that includes County Assessors and their staffs, taxpayers, taxpayer representatives, and other governmental staff.

INNOVATIONS

During Fiscal Year 2016-17, the BOE will implement and explore new methods of education and outreach.

LIVE CHAT

The CSC currently is implementing a live chat pilot program. Live Chat allows taxpayers to connect with remote agents via our website and get an immediate and personal response to their inquiry without making a phone call.

Establishing good communication with our BOE customers is paramount in today's business world. Live Chat will enhance our tax and fee payers' experience by providing thousands of BOE customers with their preferred communication medium.

CENTRALIZED REVENUE OPPORTUNITY SYSTEM (CROS)

CROS will enhance the BOE's ability to deliver education and outreach in new and more efficient ways.

YOUTUBE CHANNEL

OPA staff will explore ways to update and expand the use of BOE's YouTube channel to provide up-to-date and relevant educational content to taxpayers.

RECENT DECISIONS

VOLUNTARY INCOME TAX ASSISTANCE (VITA) PROGRAM

The VITA Program assists qualified taxpayers with the preparation of state and federal income tax returns, with a focus on assisting those who qualify for the state and federal earned income tax credit (EITC). In 2017, the Board implemented a revised policy regarding VITA outreach as approved by Board Members at their December 14, 2016 meeting. The focus of VITA efforts for BOE will be limited to efforts to recruit BOE staff to participate as VITA volunteers on their own time and promoting community resources, such as the United Way, who provide VITA services. VITA may be an add-on under the umbrella of a BOE core mission education and outreach event.

APPENDIX: EDUCATION AND OUTREACH METHODS

WEB-BASED OUTREACH

ONLINE SERVICES

Online services serve as the portal for taxpayers to perform many of their statutorily required tasks such as registering for a permit or filing a return. BTFD staff is generally responsible for implementing enhancements to online services offered by the BOE, working closely with the Technology Services Department (TSD) to make the improvements. Enhancements to online services are made regularly due to new legislation, revised policies, or enhance capabilities.

PTD also hosts a Property Tax Assessor Portal which is a secure website for county assessors to access online documents that are typically made available only to assessors and their staff. The portal is only accessible with a username and password.

BOE WEBPAGE

The BOE website allows taxpayers to access online services and important information regarding the tax and fee programs administered by BOE. OPA works with program staff and the web services team to maintain and update the website.

PTD maintains a Property Tax Forms Auxiliary website that makes available the forms prescribed by the BOE for use by county assessors in the administration of the property tax programs. The website contains more than 100 forms developed by CAPD in pdf fillable and ADA compliant formats. The California Assessors' Association uses these forms in their e-Forms Taxpayer Program to provide taxpayers access to forms that can be completed online.

INDUSTRY SPECIFIC WEBPAGES

In addition to many tax and fee guides with relevant information on key tax and fee issues, industry specific webpages focus on a single industry or tax topic. They are intended as a one-stop shop for relevant tax and fee information a taxpayer may need about a specific industry. BTFD is continually creating new pages and updating existing pages with new information.

Industry and Tax and Fee Guides are available online at boe.ca.gov/industry. The following list includes current topics and those under development:

Industry Guides	Tax and Fee Guides
<ul style="list-style-type: none"> • Agricultural Industry • Auto Repair Garages • Caterers • Construction Contractors • Destination Management Companies • Gas Stations • Grocery Stores • Liquor Stores • Medical Cannabis Businesses • Mobile Phone Vendors • Motor Vehicle Dealers • Nonprofit Organizations • Out of State Retailers • Restaurants • Winemakers 	<ul style="list-style-type: none"> • Cigarette and Tobacco Products • Film & Television • Green Technology • Lumber Products • Manufacturing Exemption • Prepaid Mobile Telephony Services (MTS) Surcharge • Purchases of Log Homes • Regional Railroad Accident Preparedness and Immediate Response Fee • Vehicles, Vessels & Aircraft • Veteran's Tax Topic

VIDEOS AND PUBLIC SERVICE ANNOUNCEMENTS (PSA)

Educational and informational video content is focused on helping taxpayers operate successful businesses through accurate recordkeeping, tax preparation, payment, and enhanced industry and business knowledge.

The video content is produced by BOE Media Production Services Section (MPSS) within EAD, with support from BTFD, PTD, FOD, Member Offices', OPA, and OSD.

The marketing and education branch of OPA produces 60-second videos with general BOE information. These videos guide viewers to links where they can find videos on more complex tax issues. These videos highlight new laws and regulations, as well as the services and resources available through BOE.

The marketing and education branch of OPA will refresh existing videos, guiding viewers to additional information. OPA works in conjunction with MPSS to provide videos that can be posted on KBOE and displayed in field office lobbies.

WEBINARS

Webinars help taxpayers operate successful businesses through accurate recordkeeping, tax preparation, payment, and enhanced industry and business knowledge. The webinars are produced by MPSS within EAD, with support from BTFD and FOD.

PTD, in collaboration with the California Assessors' Association, also facilitates annual webinar sessions to provide statutory provisions, procedures, and other information regarding specific property tax programs or issues to county assessors' staff, assessment appeals board members, and BOE staff.

EMAIL, MAIL AND TELEPHONE OUTREACH

EBLASTS

eBlasts are automated electronic/e-mail messages sent to accounts with a valid email address on file. eBlasts are used to remind tax and fee payers to file returns and pay the taxes and fees due. Various program areas also use eBlasts to email informational material such as special notices to tax and fee payer accounts or to announce other educational opportunities such as seminars or workshops.

SPECIAL NOTICES

A special notice is created and distributed to the appropriate audience when tax/fee information needs to be shared with taxpayers. For example, a tax law change impacts a specific industry, a notice is drafted and sent to the affected taxpayers. These notices typically relate to a change in policy, tax law, tax rates, or any area where additional education for taxpayers is necessary. Special notices are distributed via email for accounts that have a valid email address on file. Tax and fee payers without an email address on file, or tax and fee payers that BOE is unable to reach via email, will receive a hard copy notice via mail. Distribution methods are adjusted based on volume, the nature of the tax or fee issue, and the tax and fee payer base.

EDUCATIONAL PUBLICATIONS

Publications provide information to taxpayers on the proper application of tax to specific types of transactions or specific industries, the role of the BOE, the appeal process, and the role of Board Members. Publications are continually updated to ensure taxpayers have the latest information about the proper application of tax to transactions that may impact their business. MPSD designs, prints, and in some cases mails these publications. Tax and fee payers may access these publications on BOE's website, order them from BOE's Customer Service Center or Supply Management, or obtain them at various education and outreach events. These publications may also be distributed via targeted mailings to small businesses, nonprofit organizations, veterans, consumers, tax professionals, and others.

NEWSLETTERS

Newsletters covering a wide range of tax and fee topics are issued to provide news and events specifically related to the tax and fee programs administered by BOE. For example, newsletters serve to inform and educate tax and fee payers of new legislation,

revised regulations, and updated publications. They also include specific articles of interest and routinely reiterate the tax and fee payers' rights and responsibilities under the law. BTFD is responsible for developing quarterly Tax Information Bulletins, bi-annual Tax Practitioners' newsletters, and an annual electronic Special Taxes and Fees Newsletter.

WRITTEN TAX ADVICE

Tax and fee payers may write to ask BOE staff a specific question and obtain written advice. Under certain circumstances, the tax and fee payer may be relieved of any tax, fee, interest, or penalties that may be due if they relied on written advice that resulted in under reporting a tax or fee.

TELEPHONE INQUIRIES

BOE provides a toll free number for taxpayers and the public to call and ask any question pertaining to the tax and fee programs administered by BOE. The Customer Service Center handles the bulk of these calls with PTD's Assessment Services Unit fielding all calls relating to property taxes. When the caller has a technical question that is beyond the scope of call center staff, the call is transferred to staff in the appropriate program area. The bulk of calls regarding special tax and fee programs also received on this toll free number are automatically routed by the phone system directly to BTFD.

TELEPHONE TOWNHALLS

Telephone townhalls are live phone conferences, supported by web-based technology that allows BOE to connect to multiple callers at once. Callers listen to speakers and may ask questions during the townhalls. These events are an effective way for taxpayers to interact with the BOE from their homes or offices.

PROACTIVE OUTREACH MANAGER

The proactive outreach manager project utilizes the automated calling features provided by BOE's phone system. In an effort to improve customer service while increasing voluntary compliance, automated calls are placed to specific taxpayers advising them of upcoming tax and fee returns and license renewals.

IN-PERSON OUTREACH

STATEWIDE COMPLIANCE AND OUTREACH PROGRAM (SCOP)

SCOP was established to educate the business community about their tax responsibilities. SCOP representatives conduct visits to nonresidential businesses to verify they hold the required state tax and fee permits and licenses and answer any questions the business owner might have. These representatives also contact business owners by phone.

BUSINESS CONSULTATIONS

Taxpayers may request a free tax consultation through their local Taxpayer Service Center. Field office staff provide this service by going to the taxpayer's business and, at the taxpayers' request, reviewing business operations, record keeping and filing requirements, how to use online services, and common compliance issues specific to their industry and business model. This assistance greatly increases the business owner's opportunity for success.

INTERESTED PARTIES MEETINGS

BTFD staff draft new regulations or amend existing regulations. The regulatory process includes preparing discussion papers and conducting meetings with interested parties to obtain input. This ensures the final regulation adopted by the Board addresses concerns that may impact the affected tax or fee payers. Similarly, the Property Tax Committee, the PTD, and the Legislative and Research Division periodically conduct interested parties meetings regarding proposed rules, forms, sections of the *Assessors' Handbook*, procedural guidelines, and/or legislative proposals.

SEMINARS

Small business tax seminars are half or full day events, that bring subject matter experts from BOE, Franchise Tax Board (FTB), Employment Development Department (EDD), and Internal Revenue Service (IRS) together to present important information regarding compliance with California's complex tax laws and regulations. In addition to participating in the training, individual business owners can meet with staff from these agencies during breaks to ask specific questions. BOE staff is available at these seminars to assist with online services such as registration and filing.

Industry specific seminars are small business seminars that are tailored to the registration and compliance requirements of a specific industry, for example dry cleaners or manufacturers.

Nonprofit tax seminars are similar to small business tax seminars in that they are half or full day events, but focus on issues related to compliance requirements for nonprofit organizations. In addition to BOE, FTB, EDD and IRS filing issues, BOE staff covers property tax information relevant to nonprofits. Continuing education credits are available to tax practitioners who participate in nonprofit seminars.

Veterans Seminars are small business tax seminars tailored to address the specific needs of veteran-owned businesses. The State of California and the U.S. Government provide certain support and benefits to veteran-owned businesses as a token of gratitude for veterans' service. This seminar format includes all the compliance information contained in the small business tax seminar, while also providing information on the specific additional resources and support available to veterans.

Disaster relief seminars/forums are held throughout California when the Governor declares a disaster that affects properties subject to property taxation. These BOE seminars/forums are hosted by local governmental agencies, and BTFD and PTD staff attend and/or provide comprehensive handouts disseminating information to taxpayers whose property has sustained damage by fire, flood, earthquake, or other calamity.

WORKSHOPS

Workshops are shorter than small business seminars, lasting 30 to 120 minutes, and focus on a very specific topic. Topics covered include Basic Sales and Use Tax, Record Keeping, Tax Return Preparation, and are sometimes industry specific (i.e. auto repair or food industry). These workshops are held in English, Spanish, Chinese, and Vietnamese.

IFTA WORKSHOPS

International Fuel Trade Agreement (IFTA) Workshops are intended to help new IFTA carriers understand their rights and responsibilities as an IFTA licensee. Topics covered include an overview of IFTA, how to prepare for an audit, record keeping and retention, online IFTA quarterly return filing, electronically paying an invoice, and license renewal.

CLASSROOM SESSIONS

All persons performing the duties of a property tax appraiser as an employee of the BOE or the 58 County Assessors' offices must hold a valid appraiser's certificate issued by BOE and must maintain that certification with specified annual training.⁶ PTD annually conducts classroom sessions throughout California on various property tax assessment and procedural topics. Additionally, BOE partners with staff from county assessors' offices to conduct BOE classroom sessions.

CONFERENCES

Conferences are full day events on a larger scale than Small Business Tax Seminars. These events focus on business owners and topics covered in general sessions and breakout sessions that deal with a range of business development issues and tax compliance. Examples of past conferences include Connecting Women to Power and the International Trade Expo.

SPEAKERS BUREAU

Speakers Bureau events are sponsored and coordinated by nonprofit or community-based organizations and other local and state agencies. These outside entities ask BOE to provide subject matter experts (SME), conduct workshops, and staff exhibit tables. EAD

⁶ Revenue and Taxation Code section 670 through 673.

coordinates with BTFD and FOD to ensure SMEs are scheduled and appropriate materials are available for these events. In addition, BTFD staff engages in public speaking events as requested by members of industry.

For example, EAD has identified the following events where BOE plans to send SMEs and/or staff a booth:

- California League of Food Processors – Food Processing Expo 2017
February 8-9, 2017 at the Sacramento Convention Center
- California Green Summit
April 26, 2017 at the Sacramento Convention Center
- Small Business Week – various events
April 30-May 6, 2017 in San Jose, Oakland and San Francisco
- CPUC Small Business Expo
May 3, 2017 in Los Angeles
- California Small Business Day, sponsored by the CA Small Business Association
Late May or early June 2017 in Sacramento,
- SCORE Small Business Seminar
May 2017 in Oxnard

STAKEHOLDER RELATIONS

BOE staff from EAD, FOD, BTFD, and PTD work in many ways to create and strengthen relationships with stakeholders. They are proactive in building contacts and partnerships with local officials, industry leaders, business owners, and trade associations. They also attend regularly scheduled meetings of community, industry, business and taxpayer groups as well as grand openings, annual conferences and other regional business events. In keeping with California's diverse population, there is an effort to reach out to communities of interest and find effective ways to engage them in the discussion of tax compliance.

These connections allow taxpayers and other stakeholders to communicate more effectively with BOE staff when regulatory, statutory, or compliance issues arise and help promote voluntary compliance. Often these relationships expand BOE educational opportunities by generating invitations to participate in events sponsored by other government, non-profit, or private sector entities.

OTHER OUTREACH

SOCIAL MEDIA

Social media is used to promote the BOE's education and outreach resources by placing 60 second general information videos on Facebook, Twitter, and other sites including

links so viewers can then find additional information and videos on BOE's website. OPA will also work to increase social media awareness with an in-house campaign encouraging BOE employees to follow and share BOE messages.

TRANSLATIONS

The BOE is committed to educating all California tax and fee payers, including non-English speakers, to help them understand tax laws and voluntarily comply. To promote tax compliance and better serve the needs of California's diverse business community, the BOE provides information in 23 languages and has many documents translated in Chinese, Korean, Spanish, and Vietnamese; our core, or most commonly requested languages.

In some cases, BOE also translates special notices into the core languages. These special notices are distributed to taxpayers and placed on BOE's website. A listing of all translated forms and publications is available on our website.

Prepared by External Affairs Department

Deputy Director, External Affairs Department

Mark DeSio

450 N Street, MIC 86

Sacramento, CA 95814

Office: (916) 445-1859

Email: mark.desio@boe.ca.gov