

Potential Board Workplan for Communications and Outreach  
Prepared by Yvette M. Stowers  
September 2022



/s/ Catherine Taylor  
Catherine Taylor, Chief, Board Proceedings  
and Support Services Division  
**Meeting Date: 9/28/2022**  
**Minutes Exhibit: 9.5**

## **INTRODUCTION**

Through Chair Cohen and the Board's leadership, it has been a top priority for the Board to enhance its communications and outreach to ensure that taxpayers and the public are aware of the State Board of Equalization's (BOE) constitutional and statutory duties. The Board, at its July 2022 Board Meeting, directed the Executive Director to bring back a workplan on a potential Board Work Group on Communications and Outreach that would include communications with the Legislature, stakeholders, and others.

## **BOARD MEMBERS' STRATEGIC PLAN**

Established in 2020, the [Board Members' Strategic Plan](#), includes four separate and important goals focused on fundamental priorities and actions to ensure the Board's Constitutional duties are performed effectively, with transparency, and always, in service to the people of California.

With a focus on education and outreach, Goal #3 was approved as a three-year strategy to:

*"Develop an education and outreach plan. The action for this goal is to "require each Board Member to develop a district focused education and outreach plan which is updated annually and adopted by the Board."*

To enhance the branding of the Board, Goal #4 was also approved as a three-year strategy to:

*"Develop an agency-wide branding campaign to ensure that California taxpayers, elected officials, business associations, non-profits, veterans, and other constituencies are knowledgeable about the Agency and the Board as well as their exclusive responsibility for property tax administration."*

When the Board's strategic plan goals were adopted, the Board determined that Member Gaines will take the lead on Goal #4 in partnership with Vice Chair Schaefer. Both are currently act as the informal "workgroup" addressing the Board's agency-wide branding and communications campaign. At the August 30, 2022, Board Meeting, the informal "workgroup" presented the following branding strategies:

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1. Produce various videos to be posted to social media and the BOE home page.
2. Create and distribute direct mail pieces on various topics, including but not limited to Proposition 19, explanation of property taxes for new home buyers, and non-profits to explain property tax exemptions.
3. Board Members conduct in-district events such as speakers at conferences, coordinated events with assessors and legislators, and partner with organizations to host informational workshops.
4. Place ads on social media, local radio, and television by district and as deemed appropriate.

**BOARD'S COMMUNICATIONS AND OUTREACH ACCOMPLISHMENTS**

Since 2020, measurable progress has been made reflecting a consistent and shared approach by the Board as a whole and by individual members working within their Equalization Districts. The efforts and successes include:

1. Members augmented their communication and outreach with their constituencies through:
  - a. Monthly newsletters
  - b. Member press releases
  - c. Member events
  - d. Member constituent affairs
  - e. Member collaboration with local government
  - f. Member and member staff representation with government affairs groups
  - g. Social Media
  - h. Upgrade of Member's website
2. Members performed individual outreach within their districts to provide their constituents ongoing opportunities to bring issues to the Board for discussion and possible resolution.
3. Multiple public hearings and discussion on important constituent issues including:
  - a. Split Roll (Prop 15),

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- b. Base Year value transfers (Prop 19),
- c. Intergenerational transfer exclusion (Prop 19),
- d. Covid response,
- e. Assessment Appeal Boards remote hearings,
- f. Property tax incentives to spur affordable housing,
- g. Wine growers returns and schedules

These efforts show that this Board has listened to their constituents and provided a platform to bring forth issues, gather information, explore solutions, and execute plans to provide the public with the services that they need.

- 4. This Board has built strong relationships through multiple interactions and collaboration with the 58 county assessors and the California Assessors' Association.
- 5. Members have worked with members of the legislature to provide opportunities for legislative fixes to current issues and provide insight into Board activities.
- 6. The Board's Covid response has resulted in greater access to public interaction with the Board due to the new hybrid meeting style which allows the public to participate and provide public comment via telephone or video, in addition to the traditional means of letter, email, and in-person comments.

### **NEXT STEPS**

As the Board approaches the end of the three-year strategic plan, and looks to future planning efforts, it is recommended that the Board consider the following activities:

- Continue the coordinated efforts of each member to perform outreach tailored to each of their constituencies with an agreement that these efforts be summarized, presented, and discussed by the members quarterly or twice a year at board meetings.
- Evaluate the strategies recommended by the informal "workgroup".

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- Each District develop an annual outreach and education plan that reflects a consistent and shared approach that allows the members to:
  - Act as ambassadors to promote BOE's fair and equal property tax policies and the benefits of property tax funding to the people of California.
  - Augment collaboration with Legislators, County Assessors, local government officials, chambers of commerce, and taxpayer associations to co-host seminars, webinars, and town halls.
  - Pursue and enhance Board Member electronic communications such as newsletters and social media campaigns.
  - Leverage existing agency-prepared materials for education and outreach, such as:
    - Proposition 19 materials [webpage](#), [fact sheet](#), [checklist](#), [comparison charts](#), [FAQs](#), and [additional resources](#).
    - [Taxpayers' Rights Advocate Office Information Sheets](#)
    - [Disaster Relief](#)
    - Publications such as [Introduction to the California State Board of Equalization](#) and the [State Board of Equalization's 2020-21 Annual Report](#)
  - Targeted outreach communication from the Board to the Legislature, such as letters to new and returning legislators and scheduling one-on-one meetings to introduce the Board Members and BOE as a valuable resource.

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**WORKPLAN FOR POTENTIAL BOARD WORK GROUP ON COMMUNICATIONS AND OUTREACH**

**Goal:** Continue the Board's effective communication and outreach activities to further ensure that taxpayers and the public are aware of the BOE's constitutional and statutory duties.

Possible Actions	Responsible Party	Start Date	Completion Date
The Board vote to establish a Board Work Group (BWG) for Communications and Outreach. (In accordance with Board Work Group Charter <a href="#">adopted</a> at the November 16, 2021, Board Meeting.)	The Board		
The Board decide whether the BWG will consist of the entire Board or two Board Members. (When a BWG is more than two Members, meetings are required to fully comply with the notice and agenda procedures of the Bagley-Keene Open Meeting Act.)	The Board		
The BWG schedule meetings to discuss and develop a Board Communications and Outreach Plan.	BWG		
The BWG make recommendations in a Board Communications and Outreach Plan for the Board's consideration.	BWG		
The Board evaluate the recommendations and decides whether to implement.	The Board		
Implement the Communications and Outreach Plan	The Board		