

# Strategic Plan 2010-2015

## State Board of Equalization



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## EXECUTIVE DIRECTOR'S MESSAGE

It is my privilege to present to you highlights of the Board of Equalization's (BOE) [Strategic Plan 2010–2015 \(Plan\)](#). A more detailed version is available at [www.boe.ca.gov](http://www.boe.ca.gov).

As California looks for innovative ways to address the state's economic crisis, state agencies can no longer pursue business as usual. This Plan provides a framework that will enable BOE to develop more effective and efficient operations at less cost, while providing better services to taxpayers, stakeholders, and employees.

This Plan continues and builds on operational improvements envisioned by previous plans: expanding the eServices for taxpayers, initiating a paperless and digital BOE, and beginning a functional realignment that eliminates duplication of effort and improves communication and efficiencies.

The Plan also looks to the future with new initiatives to improve outreach efforts using the latest in social networking technology, replace our mainframe legacy systems with the Centralized Revenue Opportunity System (CROS), a system that will create a stable yet responsive and flexible technology infrastructure, and develop programs to ensure our staff has the technical and leadership skills to meet the challenges of the new operating environment. As a living document, the Plan will routinely be evaluated and updated as new concepts and technologies mandate changes in strategic direction.

A key factor in the Plan is the Vision Statement: BOE must be a trusted partner to the citizens of California and provide taxpayers easy and convenient processes when interacting with BOE. This vision will guide BOE as it moves to the future.

Kristine Cazadd  
Executive Director  
California State Board of Equalization

## CORE VALUES

### Fairness

- Adhere to high ethical/professional standards
- Treat taxpayers fairly and objectively
- Administer law consistently
- Practice courtesy and respect
- Maintain discrimination-free workplace

### Effectiveness

- Promote voluntary compliance
- Adhere to core principles/values, but flexible in serving the public
- Honor and safeguard taxpayer rights
- Value individual contributions

### Efficiency

- Diligently identify process improvements for understanding, reporting, and paying taxes and fees
- Achieve objectives within current constraints
- Provide highest quality services and work products
- Foster and encourage teamwork, creativity, and innovation

## GOALS

### Goal 1: Improve the Taxpayer Experience

- Expand communication through Web services
- Provide continuity of service throughout the customer experience

### Goal 2: Maximize Voluntary Compliance

- Reduce the Tax Gap
- Improve taxpayer education and outreach
- Ensure taxpayers' rights protection

### Goal 3: Invest in a Skilled, Motivated, and Diverse Workforce

- Align employees around BOE's Core Values
- Enhance staff productivity
- Improve recruitment, retention, and upward mobility opportunities

### Goal 4: Enhance Operational Effectiveness

- Improve partnerships
- Leverage technology
- Implement "BOE of the Future"
- Expand environmental stewardship

## MISSION

Administer agency tax programs while adhering to the BOE's Core Values of:

- Fairness
- Effectiveness
- Efficiency

## VISION

For the citizens of California:

- Become a trusted partner
- Provide a continuity of service for all customers
- Improve online access for information, reporting, and payment

For employees of BOE:

- Develop a work force that cares deeply about BOE's Core Values
- Provide the tools and training enabling quality work and movement into leadership positions
- Create a safe and positive workplace



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San Francisco



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John Chiang  
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The expanded web version of publication 382, *Strategic Plan 2010–2015* is available at [www.boe.ca.gov/pdf/pub382.pdf](http://www.boe.ca.gov/pdf/pub382.pdf) and provides more details about specific objectives.

Information about Taxes and Fees Administered by the Board of Equalization (Publication 41) is available at [www.boe.ca.gov/pdf/pub41.pdf](http://www.boe.ca.gov/pdf/pub41.pdf).