

Strategic Plan 2010-2015

State Board of Equalization



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A MESSAGE FROM THE EXECUTIVE DIRECTOR

It's not business as usual any more!

As California looks for innovative ways to address the state's economic crisis, there is a growing need for optimization. I believe the Board of Equalization (BOE) has an obligation to improve its workflow in ways that will benefit our taxpayers, stakeholders, and employees.

Our roadmap to future optimization is captured in our Strategic and Business plans. These plans are living documents that must be routinely evaluated and updated to take advantage of new concepts, technologies, and possible changes in strategic direction.

Since the release of our *Strategic Plan 2007–2011*, much has been achieved, much has been learned, and much has changed. We have made great strides in expanding the level of eServices provided to our taxpayers, we have charted the course to going completely digital (paperless), and we are beginning to functionally realign the organization to eliminate duplication of effort and to improve communication and efficiencies.

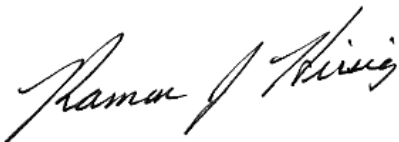
With the *Strategic Plan 2010–2015* (Plan), we are preparing the organization for the future by developing our staff so they are ready to move into positions of leadership. We will also initiate the process of replacing our mainframe legacy systems with the technology of the future, which will create a stable yet responsive and flexible technology infrastructure.

The true spirit driving the BOE of the future is embodied in the Plan's Vision Statement: BOE must be a trusted partner to the citizens of California and must provide taxpayers easy and convenient processes when interacting with BOE. I encourage you to adopt these guidelines as your own as we implement the BOE of the future.

As I consider the challenges we have faced and overcome during my time as Executive Director, I have developed what I consider to be guiding principles, which I believe significantly enhance our potential for success. I would like to open this next chapter of BOE's future with those principles:

- Have a clear vision of goals
- Establish realistic short and long range plans
- Keep it simple
- Obtain necessary support
- Be relentless in your pursuit
- Turn obstacles into opportunities
- Don't neglect the details
- Challenge the status quo
- Be optimistic and enthusiastic
- It takes a team

It is my privilege to present to you the Board's *Strategic Plan 2010 – 2015*.



Ramon Hirsig
Executive Director
California State Board of Equalization

PART I: STRATEGIC FOCUS

A. Mission

The mission of the Board of Equalization is to serve the public through fair, effective, and efficient tax administration. The BOE administers agency tax and fee programs; adopts rules and regulations to clarify tax laws; acts as an appellate body for the review of property, business and income tax assessments; assesses and allocates property values of railroads and specified utilities; and oversees the property tax assessment practices of all 58 county assessors.

B. Core Values

As we carry out our mission, we are committed to the following core values, which are essential to the success of the BOE:

Fairness

- Adhere to the highest ethical and professional standards
- Be fair and objective in our treatment of all taxpayers and consistent in our administration of the law
- Treat every individual with respect and courtesy
- Maintain a work environment free of discriminatory practices

Effectiveness

- Be persistent in promoting and encouraging voluntary compliance with the tax laws
- Be firm in adhering to our core principles and values, yet flexible in our methods for serving the public and accomplishing our goals
- Honor and safeguard all taxpayer and employee rights
- Value the individual and the contribution each makes to our organization

Efficiency

- Be diligent in identifying ways to improve and simplify the process for understanding, reporting, and paying taxes and fees
- Achieve program objectives while recognizing current resource constraints
- Provide services and work products of the highest quality
- Foster and encourage teamwork, creativity, and innovation

C. Vision

Our vision as an agency is to be a trusted partner to the citizens of California. We want taxpayers to be able to retrieve and enter their tax information easily, online, how they want it, when they want it. We want taxpayers to enjoy continuity of service throughout all of their interactions with BOE. As a result of making it much easier for taxpayers, our vision is that BOE will be better positioned to maximize voluntary compliance with its tax and fee programs.

This vision will allow us to:

- Provide continuity of service throughout the customer experience
- Provide the right information the first time
- Serve our customers how they want to be served
- Make all relevant and appropriate information available online

Internally, our vision for our organization is to create a safe and positive workplace in which people can perform their jobs effectively. Our vision is to realign the organization to operate more efficiently. We want to develop a staff that cares deeply about our core values and continually enhances the quality of our work. We want to develop the technology infrastructure that enables BOE to realize its vision. Finally, we want to make sure we are preparing the organization for the future by developing our people and enabling them to acquire the skills and competencies needed to move into positions of leadership.

This vision will allow us to:

- Leverage other revenue and tax agencies to maximize efficiency
- Continue to develop our workforce
- Develop a central office and field offices that more efficiently serve our needs
- Restructure the organization to align functions more effectively

To implement this vision, we will increase our capacities to provide:

- Timely response to taxpayer inquiries
- Improved access to taxpayer information
- Updated and more functional technology
- Prepared and skilled workforce

PART II: GOALS AND OBJECTIVES

Goal 1: Improve the Taxpayer Experience

The BOE wants to improve the taxpayer experience so that it is easy to do business with BOE electronically. This includes expanding our eServices and making relevant and appropriate information available online. We also want to make our processes more accessible, more efficient, and more transparent to the taxpayer, always mindful of protecting taxpayer rights.

Objectives:

1.1 Expand Communication through Web Services

- BOE will facilitate easy online registration and filing.
- BOE's website will become customizable for each taxpayer, enabling them to access the information they need easily and receive customized communications from BOE.
- BOE will provide the tools to help taxpayers meet their business needs.

1.2 Provide Continuity of Service throughout the Customer Experience

- BOE will ensure that each taxpayer has a single point of contact, guiding them in the handling of their various tax-related questions and needs.
- BOE will train and empower personnel in its call center and customer service counters to make immediate updates to taxpayer records.

Goal 2: Maximize Voluntary Compliance

The BOE is committed to improving taxpayers' knowledge of the legal requirements for doing business in California. This includes providing new ways for them to understand and voluntarily comply with the tax and fee laws we administer while protecting the rights of the taxpayers.

Objectives:

2.1 Reduce the Tax Gap

- BOE will concentrate efforts on identifying and issuing permits and licenses to all businesses and consumers required to be registered with the BOE to report sales tax, use tax or special taxes.
- BOE will continue to maximize collection of past due amounts by closely monitoring businesses and industries with a pattern of under-payment (or under-reporting).

2.2 Improve Taxpayer Education and Outreach

- BOE will continue to reach out to taxpayers and educate them about the tax laws and other information relevant to their businesses.
- BOE will enhance the Speaker's Bureau and use of publications and online information to communicate regularly with taxpayers on topical issues and concerns.

2.3 Ensure Taxpayers' Rights Protection

- BOE will promote staff's commitment to honor and safeguard the rights of taxpayers.
- BOE will provide a process that ensures fair and timely adjudication of appeals.

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

The BOE is committed to providing a positive and healthy work environment. BOE wants to develop employees that care deeply about BOE's core values. BOE also wants to keep employees informed, provide them the tools needed to perform their work, and acknowledge their contributions to the agency's overall success. The BOE will continue to champion an effective statewide civil service process while improving organizational and program efficiencies.

Objectives:

3.1 Align Employees around BOE's Core Values

- BOE will ensure that employees are trained in our core values of Fairness, Effectiveness, and Efficiency and that behaviors tied to core values are measured and reinforced at all levels.

3.2 Enhance Staff Productivity

- BOE will launch a set of initiatives aimed at improving staff productivity and enabling a mobile workforce.

3.3 Improve Recruitment, Retention and Upward Mobility Opportunities

- BOE will ensure that current employees receive the tools, skills, and competencies to maximize their strengths.
- BOE will ensure a plan is in place to meet the workforce needs of the future.

Goal 4: Enhance Operational Effectiveness

The BOE will continue to maximize its efficiency and effectiveness by partnering with other tax agencies to create centralized or shared services where appropriate, moving to a new program delivery model organized by function rather than tax program, reevaluating our headquarters and field office space needs based on the new program delivery model, and relocating to offices that meet BOE's business needs.

Objectives:

4.1 Improve Partnerships

- Working with the Franchise Tax Board (FTB), the Employment Development Department (EDD), and the Internal Revenue Service (IRS), the BOE will develop new exchanges of data that result in higher levels of collections.
- BOE will continue working at local, state, and national levels to ensure equitable treatment for all taxpayers and property owners.
- BOE will continue to work with the FTB and the EDD to consolidate services and streamline the taxpayer experience.

4.2 Leverage Technology

- BOE will become a "digital office." Taxpayers, staff and other stakeholders will have flexible and timely access to information they need to accomplish their work.
- BOE will organize its data so that it is searchable, geographical, and sharable. Services will be developed for accessing and exchanging BOE data.
- BOE will turn its data into information, and information into knowledge for decision making. Specifically, BOE will construct a data warehouse and provide analytical tools, reporting systems, and querying mechanisms to convert information into business intelligence.
- BOE will provide a customizable website that will offer taxpayers information that is useful to their businesses.
- BOE will acquire a new state-of-the-art information system for tax administration and processing.

4.3 Implement "BOE of the Future"

- BOE will reorganize how it is structured so that functions currently housed within different tax programs are aligned.
- BOE will move to new facilities that better meet the agency's business needs.

4.4 Expand Environmental Stewardship

- BOE will reduce its consumption of resources and increase its levels of recycling.
- BOE will reduce the amount of paper required from taxpayers.

