



MALIA M. COHEN
MEMBER, SECOND DISTRICT
CALIFORNIA STATE BOARD OF EQUALIZATION

February 20, 2020

TO: MEMBERS OF THE BOARD OF EQUALIZATION
FROM: MALIA M. COHEN, MEMBER, SECOND DISTRICT
RE: BOARD MEMBER STRATEGIC PLAN – RECOMMENDATIONS

Attached please find my proposed recommended changes to the 2020-2023 Board of Equalization Strategic Plan.

If you have any questions regarding my recommendations, please contact me directly at 916-445-4081.

Thank you.

Attachment



2020-2023

Board of Equalization

Strategic Plan

- Goal 1. Ensure the Board's Constitutional mandates are being performed in the most cost effective, efficient, and timely manner with the 58 elected Assessors and California taxpayers in the forefront**
- 1.a. Establish that the Agency has the resources and infrastructure necessary to fulfill its workload**
- 1a.1. Direct the Executive Director to conduct an assessment of the Agency to determine whether the Agency has the resources and infrastructure necessary to fulfill its workload
 - 1a.2. Direct the Executive Director to provide the Board a report on the outcome of the assessment and the recommendations on addressing the resource and infrastructure gaps
 - 1a.3. Direct the Executive Director to develop a plan of action to address the resource and infrastructure gaps within the next three years
 - 1a.4. Collaborate with the Executive Director to champion the resource and infrastructure needs within the Administration and the Legislature as well as other relevant constituencies
- 1.b. Assure Board Member fiscal responsibility, ethical accountability and commitment to public services**
- 1.b.1. Continue to have the Executive Director's to provide quarterly Agency fiscal reports
 - 1.b.2. Initiate the quarterly reports on the constitutional functions carried out by CDTFA and the State Controller's Office
 - 1.b.3. Conduct an annual review of and formal in-person training on the Board governance policy
- 1.c. Establish that the Board Members have the resources and infrastructure necessary to fulfill their Constitutional responsibilities and associated workload**
- 1.c.1. Collaborate with the Executive Director to secure one additional exempt position supported by facility savings to ensure that each Board Members have a confidential Executive Assistant

- 1.c.2. Collaborate with the Executive Director to conduct an assessment of the Board Member's Offices to determine whether the respective offices have the resources and infrastructure necessary to fulfill their Constitutional responsibilities and associated workload
- 1.c.3. Develop a plan of action to address the resource and infrastructure gaps within the next three years
- 1.c.4. Collaborate with the Executive Director to champion the resource and infrastructure needs with the Administration and the Legislature as well as other relevant constituencies

Goal 2. Establish and meet workload priorities and provide direction for Members to achieve statewide objectives and workload in a manner that ensures maximum transparency and opportunity for open discussion

2.a. Determine the Boards 2020-2023 strategic priorities

- 2.a.1. Complete the CA Tax Modernization Initiative which includes convening statewide informational hearings and stakeholder town halls, conducting surveys and the review of laws, regulations and processes
- 2.a.2. Identify and assess stakeholders' priorities
- 2.a.3. Publish the findings of the initiative
- 2.a.4. Develop work plan for the Board to address the findings and associated priorities

Goal 3. Develop a Board Education and Outreach Plan to ensure that Taxpayers, Assessors, Business Associations, Non-profits, Veterans and other stakeholders are knowledgeable about property tax rules, regulations and laws to ensure taxpayer voluntary compliance

3.a. Expand and strengthen the property tax knowledge and compliance of taxpayers, businesses, non-profits veterans and other stakeholders

- 3.a.1. Develop a Board Member Education and Outreach Framework/Guidelines
- 3.a.2. Require each Board Member to Develop a district focused Education and Outreach plan which is updated annually and adopted by the Board
- 3.a.3. Determine publications, materials, supplies, resources and budget needed to implement the outreach plans
- 3.a.4. Collaborate with the Executive Director to champion the necessary resources needs with the Administration and the Legislature as well as other relevant constituencies
- 3.a.5. Implement phases of the plan based on available resources

Goal 4. Develop an Agency-Wide Branding Campaign to ensure that CA 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

4.a. Launch a three-year branding campaign

4.a.1 Collaborate with the Executive Director to develop a scope of work for branding campaign

4.a.2. Secure a consultant

4.a.3. Direct the consultant to develop a plan and associated budget

4.a.4. Collaborate with the Executive Director to champion the resource needs with the Administration and the Legislature as well as other relevant constituencies.