



BOARD OF EQUALIZATION

**CUSTOMER SERVICES AND ADMINISTRATIVE  
EFFICIENCY COMMITTEE MEETING MINUTES**HONORABLE CLAUDE PARRISH, COMMITTEE CHAIR  
450 N STREET, SACRAMENTO

APRIL 17, 9:30 A.M.

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**ACTION ITEMS AND STATUS REPORT ITEMS****Agenda Item No: 1****Title: Internet Services Expansion****Issue/Topic:**

Mr. Ramon Hirsig, Deputy Director, Sales and Use Tax Department and Mr. Bob Austin, Chief, Technology Services Division introduced the discussion on the Internet Services Expansion.

**Committee Discussion:**

Mr. Ramon Hirsig introduced the item and gave a brief background statement as to why the issue was back before them as directed by the Committee on July 31, 2001.

Ms. Mandel indicated that the Controller was still reviewing the issue and had some questions related to the issues Franchise Tax Board (FTB) has had recently with free Internet tax return preparation.

Mr. Andal wanted to know when the project would get started. Staff explained that Phase I would begin in December 2002 with the preparation of the first Feasibility Study Report. Mr. Andal asked about the timetable for the proposed plan. Staff stated that the timeframe is outlined in the Formal Issue Paper and that between now and December 2002 a team would be formed to be ready to start the feasibility study.

Mr. Andal questioned what would be occurring prior to December 2002. Staff stated the Revenue Database Consolidation (RDC) ongoing work to fully integrate the Special Taxes system into the IRIS system would be continued. The scheduled completion date for the entire RDC project is in 2004 with the components and staff for Phase I of Internet Services Expansion being available in December 2002.

**Committee Action/Recommendation/Direction:**

Mr. Klehs moved, seconded by Mr. Chiang, to adopt staff's recommendation of the master plan for expansion of BOE e-services and authorized staff to develop a Feasibility Study Report (FSR) as reflected in the April 5, 2002 Board Formal Issue Paper Report. The motion passed.

**Agenda Item No: 2****Title: Customer and Taxpayer Service Level – 1-800 Number/Information Center****Issue/Topic:**

Ms. Jerri Dale, Chief, Customer and Taxpayer Services Division introduced the issues associated with maintaining service levels in the Board's Information Center.

**Committee Discussion:**

Ms. Dale provided background on why the Average Speed of Answer (ASA) is exceeding the 90-second goal mandated by the Board. Ms. Dale explained that several factors contributed to lower service levels including state budget and staffing reductions (including four in the Division), high vacancy rates and turnover and higher customer demand for services. Ms. Dale indicated that staff seeks Board support to conduct a thorough analysis of the Information Center.

Mr. Andal expressed concern about changing the standard 90-second ASA. He commented that the vacancy and turnover rates are extraordinarily high which he attributes to the physical difficulty of the work, stress of calls both for employees and taxpayers, and the low paying, entry level positions. Mr. Andal stated that staff should be hired more quickly. Mr. Klehs agreed and suggested that the Board should work with the Department of Finance (DOF) to get these positions identified as part of the revenue process. Mr. Klehs added that people calling the Information Center want to make sure they pay the right amount of tax and should be considered direct revenue producing and exempt from the hiring freeze. Executive Director James Speed stated that he had just received approval from the DOF to substitute staff reductions in the Information Center.

Ms. Dale acknowledged the collaboration with Sales and Use Tax Department, Property Tax Department, Return Analysis Section and others in order to minimize the impact of the current situation. Additionally, staff has submitted hiring freeze exemptions to DOF; three of which were denied with one pending.

**Committee Action/Recommendation/Direction:**

The Board voted to maintain the 90-second Average Speed of Answer.

Approved:           /s/ The Honorable Claude Parrish  
The Honorable Claude Parrish Committee Chair

                          /s/ James E. Speed  
James E. Speed, Executive Director

BOARD APPROVED

At the           April 18, 2002 Board Meeting

                          /s/ Deborah Pellegrini  
Deborah Pellegrini, Chief  
Board Proceedings Division