



- Board Members
- Business Taxes Committee
- Customer Services and Administrative Efficiency Committee
- Legislative Committee
- Property Tax Committee
- Other

Topic:

Status Report on the Progress of the Board of Equalization's Organizational Effectiveness Teams

Background:

Last year, the Board of Equalization conducted an Organizational Health Survey. The survey identified various issues of concern and indicated a need to strengthen several areas of the organization.

To address the survey results, Executive Director Jim Speed established five, executive-level Organizational Effectiveness Teams: Careers, Internal Communications, Work Rules, Integrated Revenue Information System (IRIS), and Training. This quarterly report is intended to inform the Members of the teams' progress and to alert them of any emerging issues.

The general nature of the Organizational Health Survey results required the teams to begin their work by gathering more information. While beneficial, the survey results did not provide precise, in-depth details. For example, while internal communications was identified as an issue, the survey did not provide specific information on the problem or the policy or procedure at issue.

As a result, the teams had to solicit more-specific information to better understand the nature of staff concerns. To do so, they conducted meetings, convened pre-established employee focus groups, solicited written input, and where possible, reviewed the survey details for additional insights. The meetings with the four staff focus groups (rank-and-file employees and supervisors in northern and southern California) proved to be extremely productive. The focus group structure enabled the teams to gather information across organizational lines and from various agency levels. The focus groups have also allowed the teams to obtain more timely feedback, have an exchange of information, and test ideas and assumptions.

Current Status:

The Organizational Effectiveness Teams have completed the information-gathering phase described above, developed charters, identified specific activities in their areas of concern, and developed workplans to ensure their tasks will be completed in a timely manner. We are using the agency Intranet, eBOE, to keep staff informed about the teams' purpose and progress. eBOE includes a section of team workplans and status reports, and the "Director's Weekly" column published on the site often addresses related issues.

More information on the teams' progress is included in the attached document: *Board of Equalization Organizational Effectiveness Teams' Activities*.

Conclusion:

The five Organizational Effectiveness Teams are making progress and should continue with their planned activities. A report on the teams' activities will be presented to the Members each quarter.

Prepared by: Customer and Taxpayer Services Division
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