



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

Topic:

EQUAL EMPLOYMENT OPPORTUNITY OFFICE ANNUAL UPDATE

Background:

In May 2001, the Board was provided a copy of the Cooperative Personnel Services (CPS) Report on the Equal Employment Opportunity (EEO) Office. The Report was comprehensive and provided 41 Key Findings, and 33 Recommendations to address improvements identified in the following broad areas:

- EEO Office policy and the strategies used to carry out EEO policy.
- Functions of the EEO Office.
- Organizational structure of the EEO functions.
- Staffing of the EEO Office.
- Training of the EEO Office staff.
- Organizational style of the EEO Office.

A Workplan was developed to address the CPS identified areas of improvement. All report recommendations have been completed.

At the August 1, 2001 Board meeting, the Board designated Ms. Jennifer Willis as the EEO Officer. On August 31, 2001 Ms. Doris Dominey was hired as the EEO Office Manager running the day-to-day operations. During the October 24, 2001 Board meeting, the Board requested that Ms. Willis identify the EEO Office's top five priorities to be completed over the next year and provide a one-year status report. An interim status report was provided to the Board on June 19, 2002. This is the one-year status report.

Current Status:

Following are the top five EEO Office priorities identified and their status.

1. Establish and update all EEO policies. Ensure all EEO complaints are addressed timely.

- 1) The Board approved the following four policies at the June 19, 2002 Board meeting: EEO Policy; Discrimination Complaint Policy and Process; Sexual Harassment Complaint Policy and Process; and Disabled Advisory Committee Policy.

The employee unions reviewed and approved the four policies in August. These policies will appear in the next release of the Board of Equalization Administrative Manual (BEAM) revisions and will be available on the Board's intranet website, *eBOE*, shortly thereafter.

A new complaint procedure was implemented to ensure that all cases are closed within 60 days. The EEO Manager approves any extension of the timeline.

2. Implement a tracking system that includes a reporting and monitoring component for EEO complaints in order to reach timely resolution.

In collaboration with Strategic Planning and Program Development Section and Research and Statistics Section staff, the EEO Office developed a case tracking and reporting system. Full implementation occurred in January 2002. Case tracking has been useful in assisting with the discrimination report required by SPB. The first confidential statistical report will be released in mid-October to the Executive Director.

3. Assist the Recruitment and Outreach Manager with recruiting efforts to attain and retain a diverse workforce.

The EEO Office continues to counsel applicants interested in working for BOE. The new Exit Questionnaire and Exit Interview processes are administered by the EEO Office to ascertain why employees leave the BOE and to recommend improvements to the work environment to retain qualified employees. A confidential quarterly report will be released in mid-October to the Executive Director. Through participation on the Executive Director's Organizational Effectiveness Careers Team, the EEO Officer and Manager review recruitment strategies and policies.

4. Implement a stronger Upward Mobility Program for movement of staff from lower paying occupations into the professional level series and provide information to assist staff at all levels with Career Development.

In collaboration with the Organizational Effectiveness Careers Team, the EEO Office developed and implemented the new Upward Mobility policy and program. The Upward Mobility policy and goals were reviewed and approved by the Executive Team, and submitted to and approved by the State Personnel Board (SPB). The policy was forwarded to the Strategic Planning and Program Development Section for publication in the Board of Equalization Administrative Manual (BEAM). New upward mobility goals for the Business Taxes Representative and Tax Auditor classifications have been developed for this fiscal year.

The Personnel Management Division, Forms and Publication Section of the Customer and Taxpayer Services Division and the EEO Office developed the publication, *Working Your Way Up at BOE*. It was provided to all BOE employees and made available on the intranet, *eBOE*, in July 2002. In addition, the EEO Office continues to actively counsel and encourage career counseling for current BOE employees on an ongoing basis.

5. Educate BOE staff boardwide on the EEO program.

EEO staff teaches the newly developed EEO training class that includes an overview of EEO, sexual harassment and discrimination. The class is taught at the quarterly Management and Supervisory Development Program (MSDP) and at staff meetings. EEO staff is scheduled to begin training BOE employees' boardwide commencing in October 2002.

In August 2002, the *Boardcaster* contained an article providing an overview of the functions of the EEO Office. The article included a photo of the new faces in the EEO Office.

In the July 2002, *eBOE Executive Director's Weekly*, EEO featured an article providing an overview of the *Working Your Up at BOE* and the revised Exit Questionnaire process and form.

ADDITIONAL ACCOMPLISHMENTS AND RESPONSIBILITIES

- The effectiveness, efficiency, and fairness of the EEO counseling function was significantly improved by separating the counseling and investigation duties between different EEO staff. This has proven to be successful in that employees feel EEO staff are objective in counseling sessions when determining jurisdiction of the complaint.
- The State Personnel Board and the Department of Fair Employment and Housing's Complaint Mediation programs have been successful. On non-EEO issues, the EEO Office continues to utilize mediation programs or refers staff to other resources.
- All EEO staff are trained to respond to informal and formal EEO complaints. Staff counsels and investigates as appropriate.
- EEO Office Manager continues to actively meet with BOE staff to communicate EEO policy concerning EEO practices and jurisdiction. Communication channels continue to be strengthened.
- Effective January 31, 2002 the EEO Office is required to review, and when necessary, investigate grievances alleging discrimination or sexual harassment. The timeline for processing grievances is 21 days. The EEO Office has coordinated with the Labor Relations Office to implement this change.
- A workforce analysis has been developed and was reviewed by the Executive Team for input. This report is required by SPB. The purpose of the report is to identify upward mobility goals in the Business Taxes Representative Tax Auditor classifications. The disabled hires are also noted. The EEO Office will be developing a survey for all BOE staff to capture the correct data on disabled employees.
- To encourage upward mobility for the Business Taxes Representative and Tax Auditor classifications, college classes will be coordinated on site and at convenient locations to accommodate employees who desire to attend required college classes to meet the minimum requirements to test for these examinations.

Conclusion:

The EEO Office will continue to strive to meet its Mission “to establish and implement an effective program to attain a diverse workforce representative of the State’s Relevant Labor Force, provide all employees and job applicants equal access to employment and upward mobility, and promote a work environment free from discrimination and sexual harassment.”

Prepared by: Taxpayers' Rights and Equal Employment Opportunity Division -
EEO Office
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