State of California

Board of Equalization
External Affairs Department

Memorandum

To: Honorable Jerome E. Horton, Chairman
Honorable Michelle Steel, Vice Chair
Honorable Betty T. Yee, First District
Senator George Runner (Ret.), Second District
Honorable John Chiang, Controller

Date: August 15, 2012

From: Jaime Garza, Deputy Director
External Affairs Department, MIC: 86

Jeffrey L. McGuire, Deputy Director
Sales and Use Tax Department, MIC: 43

David J. Gau, Deputy Director
Property and Special Taxes Department, MIC: 63

Todd Gilman, Chief
Taxpayers' Rights and Equal Employment, MIC: 70

Subject: **Board Meeting August 21-22, 2012**
Item P1-Executive Director's Report
Introduction of Proposed Customer Service Improvements Initiative

Please place this item on the Board's August 21-22, 2012 Sacramento meeting calendar under "P. Other Administrative Matters."

P. Other Administrative Matters

P1. Executive Director's Report.....Ms. Bridges

2. Customer Service Improvements Initiative – Introduction, Discussion; Request for Approval ..... Mr. Garza/Mr. McGuire/Mr. Gau/Mr. Gilman

JG:ls

Attachment
cc: Ms. Regina Evans-Jarrett
Mr. Joel Angeles
Mr. Alan LoFaso
Mr. Sean Wallentine
Ms. Marcy Jo Mandel
Ms. Kristine Cazadd

Approved Cynthia Bridges by KEC
Cynthia Bridges
Executive Director

EXECUTIVE SUMMARY

Customer Service Improvements Initiative

Excellent customer service is an essential part of the Board of Equalization's (BOE's) mission. It is the BOE's goal to treat all taxpayers with dignity, respect, and professionalism in order to fulfill the BOE's mission of serving the public through fair, effective, and efficient tax administration. The BOE remains committed to providing service of the highest quality to the public and plans to broaden its excellence in customer service to all taxpayers through the following enhancements:

- Increase range of services tailored to the diverse needs of the state's businesses and citizens.
- Redesign multilingual webpages.
- Perform a comprehensive review of all taxpayer publications and notices.
- Enhance taxpayer and public outreach.
- Expand online educational and learning products.
- Augment training and education of BOE staff.

In line with the BOE's Ethics Policy, the BOE continually strives to employ a workforce that is committed to service and accountability to the public. The public's confidence can be maintained only to the extent that the BOE's activities and contacts with the public reflect the highest ethical and moral standards.

In accordance with the BOE's mission and Ethics Policy, we recommend forming a project team that can examine the above areas in more detail and prepare a work plan for achieving the above enhancements.

We recommend moving forward with this initiative and propose placement of this initiative under the BOE's Customer Service and Administrative Efficiency Committee. Upon approval, the project team will be formed and a work plan drafted for Ms. Steel's review and input. The draft plan will be completed by November 2, 2012 so that it may be presented at the November Customer Service and Administrative Efficiency Committee.

Deputy Directors of the External Affairs Department, Sales and Use Tax Department, Property and Special Taxes Department, and the Taxpayers' Rights Advocate will provide quarterly updates on the progress of this initiative.