

First Equalization District



Accomplishments

San Francisco District

John Huk, District Administrator



Proactive Compliance

COLLECTION OF ACCOUNTS
RECEIVABLE

Percentage of New A/R Collected July '13 - Feb '14

Statewide Average: 67.86%

SAN FRANCISCO: 90.44%

**SECOND HIGHEST PERCENTAGE
COLLECTED OF ALL DISTRICTS **WOW!****

Percentage of Total A/R Collected July '13 - Feb '14

Statewide Average: 23.31%

SAN FRANCISCO: 36.43%

**HIGHEST PERCENTAGE COLLECTED OF
ALL DISTRICTS **WOW!****

Faster, Cheaper, Better

AUDIT HOURS

AVERAGE HOURS PER "NO- CHANGE" AUDIT

Statewide Average: 36 hours per audit

SAN FRANCISCO: 26 HOURS PER AUDIT

**BETTER THAN STATEWIDE AVERAGE BY
27.8% **WOW!****

TOTAL AVERAGE HOURS PER AUDIT

Statewide Average: 90 hours per audit

SAN FRANCISCO: 77 HOUR PER AUDIT

BETTER THAN STATEWIDE AVERAGE BY

14.4% WOW!

Prepare Staff to Succeed and Lead

NEW HIRES
&
STUDENT ASSISTANT PILOT

NEW HIRES IN LAST 12 MONTHS

AUDITORS	4
COLLECTORS	11
CLERICAL	<u>2</u>
TOTAL	<u>16</u>

**PERCENTAGE OF NEW HIRES TO TOTAL
STAFF - 20% **WOW!****

STUDENT ASSISTANT PILOT

Participating in a pilot project to hire student assistants and limited-term supervisors.

- Identifies potential good candidates for future audit, compliance and LAN Coordinator (IT) vacancies.
- Gives interested staff an opportunity to get exposure to the duties performed by supervisors.

Santa Rosa District

(including Fairfield Branch Office)
James Goan, District Administrator



Focus on the Customer

HOW ARE WE DOING? SURVEYS

July '13 - Feb '14

Received 524 surveys
99.81% POSITIVE RESPONSES
WOW!

“Outstanding customer service rep for the State BOE....Five stars out of five stars. Thank you so much.” January 2014

Proactive Compliance

PAYMENTS RECEIVED

July '12 - Feb '13

COLLECTED \$9,341,507

July '13 - Feb '14

COLLECTED \$12,282,384

31% INCREASE IN PAYMENTS WOW!

Percentage of New A/R Collected July '13 - Feb '14

Statewide Average: 67.86%

SANTA ROSA: 81.21%

**THIRD HIGHEST PERCENTAGE
COLLECTED OF ALL DISTRICTS **WOW!****

Percentage of Total A/R Collected July '13 - Feb '14

Statewide Average: 23.31%

SANTA ROSA: 33.92%

**SECOND HIGHEST PERCENTAGE
COLLECTED OF ALL DISTRICTS **WOW!****

Reduction of Total Accounts Receivable
July '13 - Feb '14

Statewide District Average: -2.0%

SANTA ROSA: -6.3%

**FOURTH LARGEST PERCENTAGE
REDUCTION OF ALL DISTRICTS **WOW!****

Faster, Cheaper, Better

AGED AUDITS

Aged audit assignments are at the lowest point in years.

AGED REFUNDS

Aged refund assignments are at the lowest point in years.

Innovative Business Processes

Four Disciplines of Execution (4DX)

Pilot district for the 4DX process prior to statewide deployment. Engage staff weekly in the process of giving meaningful commitments towards achieving established work goals.

Prepare Staff to Succeed and Lead

- Use 'out-of-class' assignments to expose rank and file staff to supervision.
- Staff participate as presenters in various seminars, training opportunities, and outside speaking engagements.
- Participate in BOE's upward mobility program to prepare staff to be Business Taxes Representatives.
- Participate in BOE's mentoring program.
- District representatives participate in a variety of Workgroups/Project, including: CROS, Online Services, Succession Planning, and updating/developing on-the-job training manuals.

STAFFING AND PROMOTIONS IN THE PAST 12 MONTHS

Audit – Doubled number of audit staff from 1.5 crews to 3 crews and added two supervisors.

Compliance – Total of 23 new hires or promotions.

WOW!

Oakland District

Henry Wong, District Administrator



Focus on the Customer

HOW ARE WE DOING? SURVEYS

July '13 - Feb '14

Received 424 surveys
99.8% POSITIVE RESPONSES
WOW!

"Best service ever experienced! Excellent, professional service!
Give this woman a raise." January 2014

Proactive Compliance

PAYMENTS RECEIVED

July '12 - Feb '13

COLLECTED \$15,998,818

July '13 - Feb '14

COLLECTED \$20,306,625

27% INCREASE IN PAYMENTS WOW!

Percentage of New A/R Collected
July '13 - Feb '14

Statewide Average: 67.86%

OAKLAND: 77.48%

WOW!

Percentage of Total A/R Collected July '13 - Feb '14

Statewide Average: 23.31%

OAKLAND: 28.16%

WOW!

Reduction of Total Accounts Receivable July '13 - Feb '14

Statewide District Average: -2.0%

OAKLAND: -3.1%

WOW!

Statewide Compliance Outreach Program

(Jul '13 - Jan '14)

Businesses visited: 7,207

Unreported revenue: \$3,927,275

Education and Outreach

- Partnered with local government agencies to provide education and outreach regarding potential unpermitted vendors.
- Collaborated at the Statewide Hispanic Chamber of Commerce convention.
- Attended the International Business Seminar and Resource Expo (Pakistan/US Chamber of Commerce Expo).
- Provided multilingual translation assistance.

Faster, Cheaper, Better

Audit Hours

Over extended period of time, district has completed audits in the least amount of time.

Statewide Average: 90 hours

OAKLAND DISTRICT: 64 hours

WOW!

Innovative Business Processes

Point of Sale Systems

Developing statewide training and database templates for use in audits of taxpayers who use point-of-sale systems, which will make auditing these types of businesses more efficient.

Prepare Staff to Succeed and Lead

- Use 'out-of-class' and training and development assignments to expose rank and file staff to supervision.
- Encourage participation in BOE's upward mobility program to prepare staff to be Business Taxes Representatives.
- District representatives participated in all the following Workgroups/Projects/Committees:
 - ❖ CROS
 - ❖ SUTD Audit Efficiency Workgroup
 - ❖ Hiring Workgroup
 - ❖ Speaker's Bureau Candidate Evaluation/Training
 - ❖ Disability Advisory Committee
 - ❖ Aged Audits & Audit Assignments

Staffing and Promotions

IN THE PAST 12 MONTHS

- **Hired 15 new Tax Auditors**
- **Hired three new Business Taxes Representatives**
- **Promoted 18 district staff**

San Jose District

(including Salinas Branch Office)
Veronica Santillanes, District Administrator



Focus on the Customer

HOW ARE WE DOING? SURVEYS

JULY '13 - FEB '14

Received **1,739** surveys

100% POSITIVE RESPONSES

WOW!

"...Every time I come to this office, it is a pleasant, efficient, successful experience." February 2014

Proactive Compliance

PAYMENTS RECEIVED

July '12 - Feb '13

COLLECTED \$20,263,909

July '13 - Feb '14

COLLECTED \$27,698,655

37% INCREASE IN PAYMENTS WOW!

Statewide Compliance Outreach Program

(Jul '13 - Jan '14)

Businesses visited: 2,757

Unreported revenue: \$10,814,135

Faster, Cheaper, Better

Audit Hours

Currently below statewide averages for **ALL** categories

Statewide Average: 90 hours

SAN JOSE DISTRICT: 71 hours

WOW!

Managed Audit Program (MAP)

**Statewide: Total of 32 MAPs during
FY 12-13**

SAN JOSE DISTRICT: Completed 21% (7)

Completed Audits

FY 12-13

In-State Average: 517 Audits

SAN JOSE DISTRICT: 1,102 Audits

**114% more audits than average in-state
district. **WOW!****

Prepare Staff to Succeed and Lead

District representatives participated in all the following Workgroups/Projects

- CROS Mapping
- Compliance Metrics
- Write-offs
- Aged Audits & Audit Assignments
- Hiring Workgroup
- Performance Management
- LAN Coordinators Operating Manual

SUTD Qualified Trainers (QT)

Out of 200 nominees, 33 selected

Selected five from San Jose District - the most out of any office

STAFFING AND PROMOTIONS IN THE PAST 12 MONTHS

21 PROMOTIONS

WOW!

FIRST DISTRICT TEAMWORK

The successes of the First District are truly a result of team effort – from all levels of management, supervisors and staff.



We are stronger and can achieve more by working together rather than alone.