

# Memorandum

To : Honorable John Chiang, Chair  
Honorable Claude Parrish, Vice Chairman  
Ms. Betty T. Yee, Acting Board Member  
Honorable Bill Leonard  
Honorable Steve Westly

Date: November 4, 2005

From : Ramon J. Hirsig  
Executive Director



Subject: **2006-2010 Strategic Plan Update**

This is a follow-up to my June 21, 2005 memorandum regarding our plans to update the Board of Equalization's (BOE) *Strategic Plan*.

During the past several months, Strategic Planning and Policy Development Section (SPPDS) staff have been gathering information from internal stakeholders using the methodology identified in June. A Steering Committee, comprised of key members of each of the agency's program areas, continues to meet regularly to provide direction and guidance to the project staff. In conjunction with the update of the agency's *Strategic Plan*, a report covering the agency's accomplishments for the period 1998-2004 is being refined by SPPDS staff, and is expected to be released in November/December 2005.

The following are the most significant update activities completed over recent months:

- In July, all BOE employees were notified of the start of the *Strategic Plan* update process through an Executive Director's Viewpoint article on eBOE, the agency's internal website.
- Since September, eleven cross-functional focus group sessions (with approximately ten employees per group) were conducted in Sacramento and in four field offices:
  - Six cross-functional focus group sessions were held in Sacramento for Headquarter's employees. Employees identified and discussed the issues and strategies they believe will directly impact the ability to do their jobs. Focus groups consisted of employees from all levels of the agency.
  - Focus group sessions were conducted in three of the four equalization districts (San Francisco, Culver City, and Fresno) and in New York. (NOTE: Sessions in San Diego are scheduled for November 9, 2005.) The format, structure, and discussion items for the field offices were similar to those used in Sacramento.
- A one-day management workshop featured presentations relating to economic trends and operational issues most likely to impact the agency's ability to meet its mission and goals in the next five years. In addition, the workshop's attendees participated in special focus groups targeting issues and strategies they believe will directly impact their ability to perform their assigned functions and responsibilities.

As you can see, a number of activities have already been completed. SPPDS staff are now preparing for the following upcoming activities:

- A survey will be developed and used to obtain quantitative information from all BOE employees. Formulation of the survey questions will be based upon the outcome of the focus group sessions. To encourage maximum participation from all employees in this process, survey responses will be accepted via hard copy and eBOE.
- Another survey will also be available for completion by the agency's external stakeholders. An electronic version of the survey will be posted on the BOE website and a written version will be distributed to selected stakeholders. Survey responses will be accepted via hard copy and the BOE website.

As I outlined in my Executive Director's Report on July 1, 2005, the activities described above involve reviewing and analyzing the BOE's internal and external environments to obtain feedback on issues that BOE employees and our external stakeholders perceive as important to them. Results from the focus group sessions and survey results help us to determine whether our employees and stakeholders agree that some of the top issues facing the BOE in the next five years will include such areas as e-services, staffing/personnel, customer service, and tax consolidation. Once the project team has completed their analysis of the collected data, the information will be presented to the Steering Committee, and an updated *Strategic Plan* presented to you for approval. Any items that are not appropriate for inclusion in the *Strategic Plan* will be brought forward for future consideration by the Executive Team.

I look forward to discussing this issue with you further to ensure that your vision for the agency is incorporated into the updated *Strategic Plan*. Please feel free to contact me if you have any questions regarding this memorandum.

RJH:kmt

Attachment

PC FILE: G: SPPDS/Projects & Assignments/1074 SP Update Memo to BM1

cc: Ms. Sylvia Tang  
Mr. Neil Shah  
Ms. Barbara Alby  
Ms. Audrey Noda  
Ms. Marcy Jo Mandel

Executive Team  
Steering Committee  
Project Team