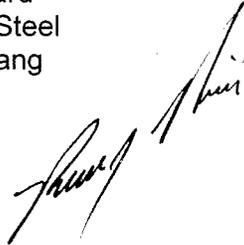


Memorandum

To : Honorable Betty T. Yee, Chairwoman
Honorable Judy Chu, Ph.D., Vice-Chair
Honorable Bill Leonard
Honorable Michelle Steel
Honorable John Chiang

Date : March 19, 2007

From : Ramon J. Hirsig
Executive Director



Subject : **Adoption of the Strategic Plan 2007-2011, Goals and Objectives – Proposed Additions
Executive Director’s Report, March 20, 2007 Board Meeting**

Attached are proposed additions to the Strategic Plan which will be presented for your approval on March 20. I recommend these additions be incorporated into the adopted Plan. In doing so, I believe we fully capture the spirit of our agency’s vision as it relates to providing protection of taxpayers’ rights.

RJH:fr

Attachment

cc: Mr. Alan LoFaso
Mr. Mark Ibele
Mr. Steve Shea
Ms. Barbara Alby
Mr. Erik Caldwell
Ms. Marcy Jo Mandel

PROPOSED ADDITIONS TO THE DRAFT STRATEGIC PLAN

Goal 1: Maximize Voluntary Compliance in BOE's Programs

Add the following as a new item between items 2 and 3:

Increase public awareness of taxpayer rights, and incorporate education and outreach in support of taxpayer rights in all BOE classes, workshops, seminars, and conferences.

Goal 2: Improve the Efficiency of BOE's Tax and Fee Programs

Add the following as a new item between items 3 and 4:

Continually seek changes to streamline and/or expedite the appeals process in support of taxpayer rights and due process.

Goal 3: Improve the BOE's Organizational Efficiency

Add the following as a new item between items 2 and 3:

Continually seek changes for resolving taxpayer complaints more rapidly.

Goal 5: Foster a Skilled, Motivated, and Diverse Workforce

Add the following as a new item between items 3 and 4:

Sustain staff training in all program areas on taxpayer rights.

Memorandum

To : Honorable Betty T. Yee, Chairwoman
Honorable Judy Chu, Ph.D., Vice-Chair
Honorable Bill Leonard
Honorable Michelle Steel
Honorable John Chiang

Date : March 9, 2007

From : Ramon J. Hirsig
Executive Director



Subject : **Adoption of the Strategic Plan 2007-2011, Goals and Objectives
Executive Director's Report, March 20, 2007 Board Meeting**

Attached please find the most current version of the 2007-2011 Strategic Plan which incorporates recent changes received. At the March 20 Board Meeting, I will be requesting your adoption of the goals and objectives articulated in this document.

Also attached are: (1) a proposed implementation plan format, for discussion only at the March 20 Board Meeting, and (2) the draft Strategic Plan presented as a discussion item at the February 1, 2007 Board Meeting.

I look forward to putting in place this visionary document for the years 2007-2011.

RJH:rar

Attachments

cc: Mr. Alan LoFaso
Mr. Mark Ibele
Mr. Steve Shea
Ms. Barbara Alby
Mr. Erik Caldwell
Ms. Marcy Jo Mandel

California State Board of Equalization

Strategic Plan

2007-2011

2007 – 2011
California Board of Equalization Strategic Plan

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A MESSAGE FROM THE EXECUTIVE DIRECTOR

March 2007

As the Board of Equalization's 13th Executive Director, I am pleased to present the Board's strategic plan for the next five years.

This plan recommits the Members and staff of the Board to outstanding customer service and increased efficiency in government service. Technology presents us with opportunities to reach more people, more efficiently in more timely and creative ways. This plan spells out how we will use technology to improve how taxpayers interact with the Board of Equalization.

This plan lays out our core purpose, core values and vision, but the focus of it is in the goals we are setting for the next five years. Here, you can see our ideas for maximizing voluntary taxpayer compliance, improving the efficiency of BOE's tax and fee programs, improving the BOE's organizational efficiency, creating an expanded and responsive infrastructure, and fostering a skilled, motivated, and diverse workforce. Each of these goals is supported by strategies that serve as a prelude to specific actions that will be articulated in a separate implementation plan.

At the core of this strategic plan is the agency's dedication to recognizing and honoring the rights of taxpayers. They are our customers and serving them well must inspire and motivate each task we undertake and the goal for which we reach. We look forward to meeting these challenges as we move closer to the next decade.

(signature)

Ramon Hirsig
Executive Director
California State Board of Equalization

PART I: OUR ORGANIZATION

The California State Board of Equalization is the nation's only elected tax commission. That obligates state tax agents to explain in a public forum why a taxpayer owes the government money, and it provides taxpayers the right to appear in that same public forum and explain to their elected officials why they do not agree with the tax agent's assessment. This unique relationship is a credit to California.

The Board is comprised of five officials who are elected to concurrent four-year terms. Four of the members are elected from districts, each representing about a quarter of the Golden State's population (approximately 9.5 million people in 2006). The fifth member of the Board is the State Controller. The Board hires an Executive Director who in turn directs the work of the more than 4,000 employees who carry out the Board's mission, goals, and directives.

The Board is charged by the State Constitution and the State Legislature with administering the state's sales and use tax, fuel, alcohol, and tobacco taxes, as well as collecting fees to fund specific state programs. More than one million California businesses are registered with the agency to engage in retail sales in the state.

The result of the successful administration of those taxes is the collection of 36% of the state's annual revenue. In fiscal year 2004-05, the Board collected \$49.95 billion in taxpayer money that the state used to fund education, public safety, transportation, housing, health and social services, and natural resources management.

In addition to administering more than 30 state tax and fee programs, the Board also acts as the appellate body for franchise and personal income tax appeals, and it plays a significant role in the assessment and administration of property taxes.

PART II: STRATEGIC FOCUS

A. Purpose

“The mission of the Board of Equalization is to serve the public through fair, effective, and efficient tax administration.” Responsibilities include:

- Administering agency tax and fee programs
- Adopting rules and regulations to clarify the laws it administers
- Acting as an appellate body for the review of property, business, and income tax determinations
- Assessing and allocating property values of railroads and specified utilities
- Overseeing the property tax assessment practices of 58 county assessors

B. Core Values

As we carry out our mission and work toward accomplishing our goals, we remain committed to the following:

Fairness

- Adhere to the highest ethical and professional standards
- Be fair and objective in our treatment of all taxpayers and consistent in our administration of the law
- Treat every taxpayer and employee with respect and courtesy
- Maintain a work environment free of discriminatory practices

Effectiveness

- Be persistent in promoting and encouraging voluntary compliance with the tax laws
- Be firm in adhering to our fundamental principles and values, yet flexible in our methods for serving the public and accomplishing our goals
- Honor and safeguard all taxpayer and employee rights
- Value the individual and the contribution each makes to our organization

Efficiency

- Be diligent in identifying ways to improve and simplify the process for understanding, reporting, and paying taxes and fees
- Achieve program objectives at the lowest possible cost
- Provide services and work products of the highest quality
- Foster and encourage teamwork, creativity, and innovation

C. Vision

The BOE strives to be a progressive and innovative organization that seeks to serve the public with integrity, efficiency, and courtesy. This *Strategic Plan* will benefit our customers and improve their interactions with the BOE, our employees and how efficiently they work, and other agencies and organizations in the exchange of information and data.

Consistent with this vision, the BOE will:

- Increase the level and quality of our “on-demand” services so that our customers can access what they need when they need it.
- Develop a staff that cares deeply about our core values and continually enhances the quality of their work.
- Provide expanded protection of taxpayer rights.
- Increase the efficiency of our tax and fee collection efforts.
- Respond quickly and effectively to new tax and fee programs and changes in existing programs.
- Integrate our services internally and with those of other related agencies and organizations to help create a seamless experience for our customers.

PART III: GOALS AND OBJECTIVES

GOAL 1: Maximize Voluntary Compliance in BOE's Programs

Objective: The BOE is committed to improving taxpayers' knowledge of the legal requirements for doing business in California. This includes providing new ways for them to understand and voluntarily comply with the tax and fee laws we administer.

Consistent with this objective, the BOE will:

1. Evaluate current business processes and work cooperatively with stakeholder groups, clarifying and simplifying the laws, regulations, and materials, to enhance taxpayers' understanding of the programs we administer.
2. Develop creative tools and marketing and outreach programs to educate California's diverse taxpayer base and provide them with the information and materials they need to comply with their legal responsibilities.
3. Explore new cost-effective technology-based delivery methods that offer self-service options available 24/7, and provide easier, more convenient access to information.
4. Identify and analyze areas of noncompliance and develop approaches (such as enhanced partnerships with other governmental agencies) to address targeted areas of concern.
5. Implement effective audit and collection modeling to ensure ease of compliance with the legal requirements of doing business in California.

GOAL 2: Improve the Efficiency of BOE's Tax and Fee Programs

Objective: The BOE is committed to fair and responsible administration of its tax and fee programs. This includes assessing, collecting, and allocating revenues more efficiently.

Consistent with this objective, the BOE will:

1. Create an environment that encourages innovative and creative ideas for changing and streamlining our business processes without diminishing the quality of our services or products.
2. Identify and implement new approaches to traditional audit, collection, and return processing functions that ensure compliance with the legal requirements.
3. Enhance communications with our external customers to allow prompt and accurate responses to issues and questions and improve existing feedback methods to ensure their concerns are heard and addressed.
4. Continually assess changes in the business environment and evaluate and modify processes and services to ensure that customer expectations and needs are met or exceeded.
5. Provide convenient, timely access to accurate information while ensuring the continued integrity of our operations and confidentiality of taxpayer information.

GOAL 3: Improve the BOE's Organizational Efficiency

Objective: The BOE is committed to actively pursuing ways that continue to deliver quality services in the most cost-efficient and effective manner. This includes using innovative management practices and methods to drive program and organizational efficiencies as operational priorities occur and expectations change.

Consistent with this objective, the BOE will:

1. Enhance working relationships with the Legislature and state agencies by providing timely, accurate, and reliable information.
2. Promote cooperative working relationships with other agencies, stakeholder organizations, and programs within the BOE, by sharing data and resources, as appropriate, to ensure the efficient use of time and resources.
3. Evaluate current processes, tools, and procedures and, through an effective change management process, modernize, update, and modify those that are no longer effective.
4. Ensure that adequate contingency plans are in place to quickly recover the agency's critical operations and provide uninterrupted service to customers in the event of a disruption to our business processes.
5. Improve our ability to measure and evaluate how efficiently and effectively we are meeting the needs and expectations of our customers by establishing a performance measurement system that includes both agency- and program-level measures.
6. Further empower our leaders throughout the agency by streamlining decision-making processes and enhancing procedural efficiencies.

GOAL 4: Create an Expanded and Responsive Infrastructure

Objective: The BOE will strive to respond quickly and efficiently to new laws and evolving business needs. As changes and improvements to current systems and structures are made, we will continue to safeguard the rights and confidentiality of taxpayers. We will use a systematic approach to change that is more responsive to the needs of those we serve.

Consistent with this objective, the BOE will:

1. Create a stable, yet flexible state-of-the-art technology infrastructure using industry best practices; and respond timely, effectively, and efficiently to new tax and fee programs and changes to existing programs.
2. Enhance the internal controls of our information technology system to ensure that data integrity is maintained and confidential data are protected from unauthorized access and use.
3. Continually evaluate the agency's external and internal environments and introduce new or enhanced technology as changing customer needs and expectations are identified.
4. Create and employ an enterprise asset management system that optimizes cost savings and identifies and plans for new and emerging trends.
5. Expand our external partnerships with other entities and organizations; explore, use, and share best practices that capitalize on the development and implementation of successful models and applications.

GOAL 5: Foster a Skilled, Motivated, and Diverse Workforce

Objective: The BOE will actively pursue ways to maintain a positive and healthy work environment that keeps our employees informed, provides the tools necessary for them to perform their work, and acknowledges their contributions to the agency's overall success. The BOE will continue to champion an effective statewide civil service process while improving organizational and program efficiencies.

Consistent with this objective, the BOE will:

1. Evaluate the effectiveness of the agency's current recruitment and personnel management programs and develop new methods to attain a well trained and knowledgeable workforce that reflects the state's diverse population and best serves the taxpayers' needs.
2. Enhance current internal communications, improve information sharing, and use team work to promote a cohesive, unified organization.
3. Ensure the essential information, tools, and equipment needed by employees to perform efficiently and successfully are provided on a timely basis.
4. Develop innovative management practices that promote a sense of purpose and accountability; continually recognize employees' accomplishments, contributions, and innovative ideas; and provides opportunities for growth, development and advancement of employees.
5. Provide a safe and healthy work environment that allows employees to work efficiently and effectively.

PART IV: OUR STRATEGIC PLANNING PROCESS

A. Developing the *Strategic Plan*

Development of the BOE's *Strategic Plan* was based on a series of processes that allowed us to look at today's environment, consider future needs of our organization and those we serve, and develop goals and strategies that will help our organization move forward.

As part of the process, BOE staff and key stakeholders were surveyed regarding opportunities for improvement. Each member of the executive management team then developed a vision of success. Those visions were merged and are reflected in this document.

Our goal is to make this a viable and living plan. We have streamlined the content of the plan to allow us to focus on key opportunities, while keeping it sufficiently broad to allow us flexibility in meeting the challenges that we will face over the next five years.

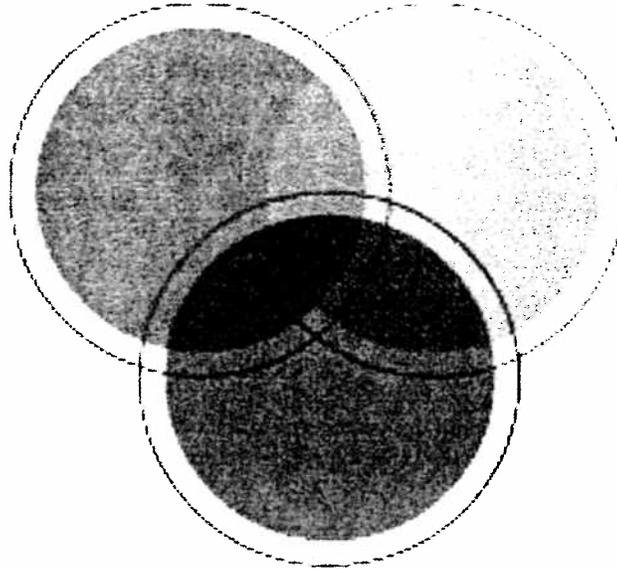
B. Living the *Strategic Plan*

A plan is only as good as its execution. Accordingly, as part of this planning process, each member of the executive management team will annually develop a three-year business plan that identifies the specific actions each will take to achieve the overall goals and objectives of the agency and its individual programs. As a part of that annual process, we will prepare regular status reports and prepare a formal report evaluating our overall success in the previous year.

Goal 1: Improve Voluntary Compliance

Proposal	Actions	2007	2008	2009	Resources Required	Assigned To
Expand Electronic Filing Capabilities for all Tax Program	a) E-Filing for Single Outlet Sales Tax Accounts	X			Yes	Project Lead
	b) E-Filing for Multiple Outlet Sales Tax Accounts		X	X	Yes	
	c) E-filing for Special Taxes Accounts		X	X	Yes	
	d) Expanded E-Services <ul style="list-style-type: none"> 1) Online Account Maintenance 2) Online Registration 3) Online Demonstration Modules 4) Online Claims for Refunds 5) Direct Deposit of Refunds 6) Online Filing of Petitions 			X X X X X X	Yes Yes Yes Yes Yes Yes	

California State Board of Equalization



2007-2011
Strategic Plan

Betty T. Yee, First District
Bill Leonard, Second District
Michelle Steel, Third District
Judy Chu, Fourth District
John Chiang, State Controller

Executive Director, Ramon J. Hirsig

January 19, 2007

2007 – 2011
California Board of Equalization Strategic Plan

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A MESSAGE FROM THE EXECUTIVE DIRECTOR

November 2006

As the Board of Equalization's 13th Executive Director, I am pleased to present the Board's strategic plan for the next five years.

This plan recommitts the Members and staff of the Board to outstanding customer service and increased efficiency in government service. Technology presents us with opportunities to reach more people, more efficiently in more timely and creative ways. This plan spells out how we will use technology to improve how taxpayers interact with the Board of Equalization.

This plan lays out our core purpose, core values and vision, but the meat of it is in the goals we are setting for the next five years. Here, you can see our ideas for improving voluntary compliance with tax laws, improving ease of access to taxpayer information, creating a great workplace, improving the efficiency of our tax and fee programs, creating a more effective and responsive agency, and providing better protection of taxpayer rights. Each of these goals is supported by specifics, including steps we are taking to accomplish them and how we will judge our success come 2011.

At the core of this strategic plan is the entire agency's dedication to recognizing and honoring the rights of taxpayers. They are our customer and our mission, and serving them well must inspire and motivate each task we undertake and the goal for which we reach. We look forward to meeting these challenges as we move closer to the next decade.

(signature)

Ramon Hirsig
Executive Director
California State Board of Equalization

PART I: OUR ORGANIZATION

The California State Board of Equalization is the nation's only elected tax commission. That obligates state tax agents to explain in a public forum why a taxpayer owes the government money, and it provides taxpayers the right to appear in that same public forum and explain to their elected officials why they do not agree with the tax agent's assessment. This unique relationship is a credit to California.

The Board is comprised of five officials who are elected to concurrent four-year terms. Four of the members are elected from districts, each representing about a quarter of the Golden State's population (approximately 9.5 million people in 2006). The fifth member of the Board is the State Controller. The Board hires an Executive Director who in turn directs the work of the more than 4,000 employees who carry out the Board's mission, goals, and directives.

The Board is charged by the State Constitution and the State Legislature with administering that state's sales and use tax, fuel, alcohol, and tobacco taxes as well as collecting fees to fund specific state programs. More than one million California businesses are registered with the agency to engage in retail sales in the state.

The result of the successful administration of those taxes is the collection of 36% of the state's annual revenue. In fiscal year 2004-05, the Board collected \$49.95 billion in taxpayer money that the state used to fund education, public safety, transportation, housing, health and social services, and natural resources management.

In addition to administering more than 30 state tax and fee programs, the Board also acts as the appellate body for franchise and personal income tax appeals, and it plays a significant role in the assessment and administration of property taxes.

PART II: STRATEGIC FOCUS

A. Purpose

“The mission of the State Board of Equalization is to serve the public through fair, effective, and efficient tax administration.” Responsibilities include:

- Administer agency tax and fee programs
- Adopt rules and regulations clarifying the laws it administers
- Act as an appellate body for the review of property, business, and income tax determinations
- Assess and allocate property values of railroads and specified utilities
- Oversee the property tax assessment practices of 58 county assessors

B. Core Values

As we carry out our mission and work toward accomplishing our goals, we must be sure that the decisions we make, strategies we adopt and the actions we take are consistent with our fundamental and shared beliefs and values as expressed below:

- *Fairness:*
 - ❑ Adhere to the highest ethical and professional standards
 - ❑ Be fair and objective in our treatment of all taxpayers and consistent in our administration of the law
 - ❑ Maintain a work environment free of discriminatory practices
 - ❑ Treat every individual with respect and courtesy
- *Effectiveness*
 - ❑ Honor and safeguard all taxpayer and employee rights
 - ❑ Value the individual and the contribution each makes to our organization
 - ❑ Be persistent promoting and encouraging voluntary compliance with the tax laws
 - ❑ Be firm in adhering to our fundamental principles and values, yet flexible in our methods for serving the public and accomplishing our goals
- *Efficiency*
 - ❑ Achieve program objectives at lowest possible cost
 - ❑ Foster and encourage teamwork, creativity and innovation
 - ❑ Provide services and work products of the highest quality
 - ❑ Be diligent in identifying ways to improve and simplify the process for understanding, reporting and paying taxes and fees

2007 – 2011
California Board of Equalization Strategic Plan

C. Vision

This plan will lead this Agency into the future with a positive impact on taxpayers and their interaction with the Board of Equalization, our employees and how efficiently they work, and other state agencies in the exchange of information and data.

For our employees, this will mean a simple way to access all information from all programs about any given taxpayer. This will lead to greater efficiencies and the ability to be more productive in day-to-day tasks.

And to the other state agencies with whom we share common tasks, we will more easily be able to exchange data that will allow each of us to more efficiently and effectively conduct our business.

Consistent with this vision, the Board of Equalization of the future will:

- Dramatically increase the level and quality of our "on-demand" services so that taxpayers and other stakeholders can access what they need, when they need it.
- Develop a staff that cares deeply about our core values and continually enhances the quality of our work.
- Provide expanded protection of taxpayer rights.
- Increase the efficiency of our tax and fee collection efforts.
- Respond quickly and effectively to new tax and fee programs and changes in existing programs.
- Integrate our services internally and with those of other related agencies to help create a seamless experience for tax and fee payers and other stakeholders.

PART III: GOALS, STRATEGIES AND MEASURES OF SUCCESS

Goal 1: Improve Voluntary Compliance

The Board of Equalization is committed to eliminating barriers that may prevent tax and fee payers from meeting legal requirements for doing business. The following strategies will provide new ways to help them understand and comply with the tax and fee laws administered by the agency.

- Provide more self-service options for tax and fee payers to manage their own accounts and liabilities
- Constantly seek opportunities to simplify taxes and fees, and the associated administrative burdens
- Create new educational tools/guides in multiple languages to easily assist tax and fee payers
- Provide tools for tax and fee payers to self audit
- Integrate our services internally with those of other related agencies to help create a seamless experience for the tax and fee payers and other stakeholders

Measures of Success

- Make e-filing and e-registration available to all tax and fee payers by 2010
- Develop and implement proposals to address areas of non-compliance
- Evaluate all existing educational tools and identify and address unmet needs

Goal 2: Improve Ease of Access to BOE Information

Our agency recognizes the diversity of California's population. To meet the varied needs of our tax and fee payers, the Board of Equalization will use different outlets to make information readily available.

- Cultivate external partnerships with tax and fee payers to better identify access needs
- Deliver new/innovative outreach programs
- Continuously improve the usability of web services
- Expand online distribution of tax information
- Respond to Public Records Act requests in a legal, timely, and courteous manner

Measures of Success

- Improve accessibility of web services to meet federal requirements
- Leverage internal resources for translation services and improve translation services
- Provide legal opinions and related documents on web
- Provide online account maintenance on demand

Goal 3: Create a Great Workplace

Our agency will actively pursue ways to keep our employees informed, acknowledge their contributions to the agency's overall success, and champion an effective statewide civil service process, while maintaining and improving program efficiencies.

- Improve internal communications
- Increase training opportunities for staff development
- Promote ongoing efforts to ensure successful implementation of succession plans
- Create a work environment that continually recognizes employees accomplishments and contributions
- Implement best practices in personnel administration
- Seek innovative recruitment opportunities to attract and retain high quality staff

Measures of Success

- Develop cross departmental communication opportunities through face to face meetings, multi-media information sharing, and memos
- Increase opportunities for employees to receive continuous education and professional certifications
- Increase leadership opportunities through onsite training and expanded rotational assignments
- Increase candidate pool for job vacancies
- Achieve optimum staffing ratios to ensure ratios support optimum workload management
- Improved parity in the BOE workforce

Goal 4: Improve Tax and Fee Program Efficiency

Board of Equalization programs are directly responsible for the administration of revenue that is vital to the funding of many of California's critical services. The following strategies will provide ways for staff to work cooperatively with our taxpayers to efficiently assess, collect, and allocate revenues.

- Streamline processes to increase efficiencies
- Improve utilization of data sharing and joint efforts with other state and federal agencies
- Create a perpetual learning environment to test and identify innovative service delivery and compliance strategies
- Develop and model specific strategies for collecting unpaid liabilities
- Improve audit selection and collection modeling to be more efficient and less intrusive on taxpayers
- Provide effective and timely data and feedback on key program indicators

Measures of Success

- Identify and implement new approaches to traditional audit, collection, and return processing functions to ensure taxes are collected, no more or less than is due
- Seek input and feedback from taxpayers on the quality of our audit and collection services
- Increase the number of potential compliance leads through more effective matching of data
- Increase audit efficiency
- Conduct joint audits between tax and fee programs to ensure taxes due are accurately collected

Goal 5: Create an Effective and Responsive Infrastructure

Today's taxpayer expects more information, provided faster than ever before. This reality, coupled with ever-changing shifts in technology make it more important than ever for the Board of Equalization to be able to respond quickly to new laws and evolving business needs. By using a systematic approach to change, our agency will be able to respond more efficiently to the needs of those we serve.

- Identify and plan for new and emerging trends
- Focus on core strengths and competencies and bring in experts as needed
- Extend and modernize the technology systems
- Employ "state of the art" security methods and tools to protect taxpayer information

Measures of Success

- Initiate repeatable processes to improve responsiveness to mandated changes
- Provide an expanded level of service offerings available directly to the taxpayer
- Exchange data with state agencies and Board business partners in real time
- Continue to ensure there are adequate security measures in place to protect taxpayer information
- Improve the quality of response to IT requests
- Create a technology system that is state of the art and will grow with us
- Create a comprehensive plan to develop a corporate data warehouse and data marts to facilitate the use of the Board's data in improving operations and compliance efforts

Goal 6: Provide Better Protection of Taxpayer Rights

Our agency will continue to look for more approaches to support taxpayer rights, as we streamline current processes and seek new ways to help improve the hearing process. We will honor and safeguard the rights of all taxpayers in everything we do.

- Increase public awareness of taxpayer rights
- Streamline/expedite the appeals process
- Expand access to legal representation throughout the appeals process

Measures of Success

- Sustain staff training on taxpayer rights
- Ensure each taxpayer has the opportunity to utilize pro bono services in the appeal process
- Continued education and expanded outreach efforts in support of taxpayer rights
- Create a user friendly legal web page
- Rapid resolution of taxpayer complaints

PART IV: OUR STRATEGIC PLANNING PROCESS

A. Developing the Strategic Plan

The development of our strategic plan was based on our active participation in a series of processes that allowed us to look at today's environment, consider future needs of our organization and those we serve, and to develop goals and measures that help our organization move forward. Development of this plan involved our clearly defining the following:

- Purpose – Why the organization exists
- Core Values – What is essential to its success
- Vision – Where the organization is going
- Goals – Long-term priorities
- Measures of Success – Short-term quantifiable results
- Strategies – Long-term plans for allocating resources
- Actions – Specific actions, responsibilities, and timetables

As part of the process, Board staff and key stakeholders were surveyed regarding opportunities for improvement. Each member of the executive management team then developed a vision of success. Those visions were merged and are reflected in this document.

Our goal was to make this a viable and living plan. We have intentionally streamlined the content of the plan to allow us to focus on key opportunities, while keeping it sufficiently broad to allow us flexibility in meeting the challenges that we will face over the next five years.

B. Living the Strategic Plan

A plan is only as good as its execution. Accordingly, as part of this planning process, each member of the Executive Team will annually develop a three-year business plan which identifies the specific actions each will take in achieving the agency's and departments overall goals and objectives. As a part of that annual process, we will prepare a formal report evaluating our success in the previous year.

An accomplishments report will be provided annually.