

Fiscal Year 2009-10

TITLE OF PROPOSAL

Board of Equalization's (BOE) Digital Office

DIVISION PRIORITY NUMBER

PROGRAM IMPACTED

All programs

SUMMARY OF REQUEST *(including impact if request denied)*

The Board of Equalization (BOE) is developing a master plan that would significantly reduce its paper usage. The plan will examine a number of technological and process improvement opportunities that may reduce paper consumption and enhance the ability of staff, taxpayers, and stakeholders to access information critical to their job functions. The plan will analyze alternatives and propose short and long term recommendations to implement those alternatives. BOE expects to complete the plan by June 30, 2008. This concept request is a placeholder pending the completion of the master plan.

BACKGROUND/HISTORY

Over the past several years, it has been the BOE's goal to move toward a paperless environment. The value and importance of this goal was recently emphasized when the top three floors of the BOE HQ were closed, forcing more than 100 attorneys to relocate offsite, leaving behind all their paper materials. This situation heightened our awareness of how heavily the BOE relies on paper materials to operate effectively. The BOE's more paper intensive operations, such as Tax Operations, could profit greatly from the numerous benefits that a paperless office offers. A paperless office can significantly increase internal efficiency, decrease printing costs and paper usage, increase customer satisfaction, and increase the level of organization. Moreover, creating a paperless environment reinforces the BOE's vision of offering "Anyplace, Anytime, Anywhere" access to information and prompt delivery of services such as e-filing and e-mailing information to the taxpayer.

STATE LEVEL CONSIDERATIONS *(including impact to other departments)*

California is facing severe budget shortfalls over the current and future fiscal years. Implementing program and technology improvements which result in efficiencies to state tax programs and increased General Fund revenues would contribute to the resolution of the budget crisis.

JUSTIFICATION *(including link to Strategic Plan)*

This proposal is directly tied to BOE's Strategic Plan:

Goal 2: Improve the efficiency of BOE's tax and fee programs.

Goal 3: Improve BOE's organizational efficiency.

Goal 4: Create an expanded and responsive infrastructure.

COSTS AND BENEFITS (BUDGET YEAR ONLY – FISCAL YEAR 2009-10)

New funding Continuation Redirection

COST	REVENUE <i>(if applicable)</i>
\$ Pending	\$ Pending
POSITIONS <i>(if applicable)</i>	COST SAVINGS <i>(if applicable)</i>
Pending	\$ Pending

PREPARED AND APPROVED

PREPARED BY Anna Brannen	DIVISION CHIEF APPROVAL
AUTHOR'S TELEPHONE NUMBER (916) 445-8677	DATE June 5, 2008

ACTION

Concept Approved Request Denied

EXECUTIVE DIRECTOR *(signature)*
