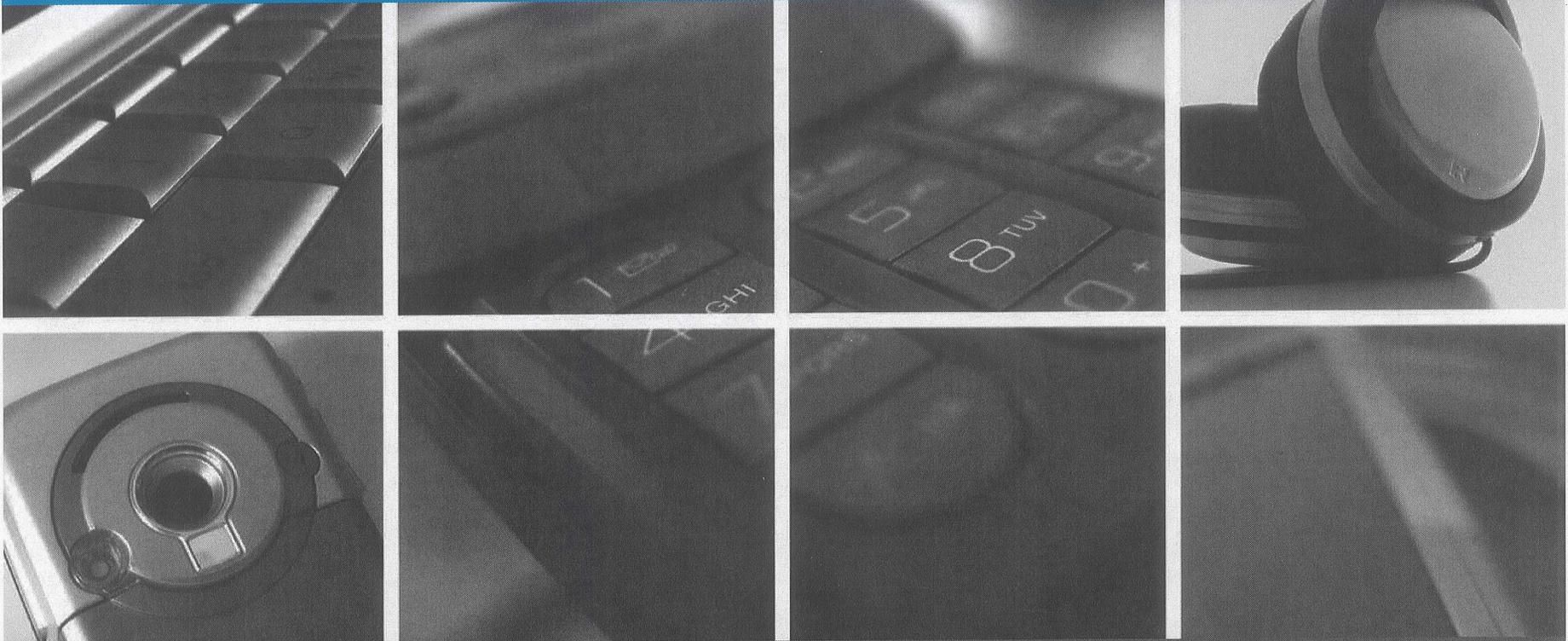


 State Board of Equalization

THREE YEAR TECHNOLOGY PLAN FISCAL YEARS 2008-2012

Publication 189 | September 2009



Honorable Betty T. Yee
First District
San Francisco

Honorable Bill Leonard
Second District
Ontario/Sacramento

Honorable Michelle Steel
Third District
Rolling Hills Estates

Honorable Judy Chu, Ph.D.
Fourth District
Los Angeles

Honorable John Chiang
State Controller

Ramon J. Hirsig
Executive Director

FOREWORD

The Board of Equalization's (BOE) *Three Year Technology Plan* is the tactical plan that supports BOE's long range strategy for technology known as *The 2020 Plan* (published April 2009). The technology plan offers goals, potential measures of success, and key activities for the five strategic concepts outlined in *The 2020 Plan*:

1. Becoming Digital
2. Data Without Walls
3. BOE@Glance
4. BOE MyWay
5. BOE Works

Our strategic concepts reflect the desired goals of business operations, policies, and practices. They represent what is expected to be achieved over the next decade. These goals are specific and measurable targets for realizing the strategic concepts. Key activities planned during the next three years are milestones towards achieving the goals. Measures of success hold BOE accountable to meeting the goals of *The 2020 Plan*.

The technology plan is flexible to meet BOE's evolving needs and priorities. It provides BOE with a roadmap for meeting the goals described in *The 2020 Plan*. The activities in the plan will require staff resources and some may require additional funding. All activities are subject to the BOE IT governance process.

The technology plan will be reassessed annually to: 1) determine the progress of each key activity underway; 2) respond to any changes in the initial planning assumptions and estimates; and 3) plan for upcoming key activities. Annual assessments provide the opportunity to adjust and reprioritize activities of the plan. Periodic adjustments to the technology plan are critical to achieve the goals of *The 2020 Plan*.

For this first release of the technology plan, four fiscal years are included. The first fiscal year is 2008/09 and is included to provide a baseline of activities that support the three fiscal years following.

Anna Brannen
Chief Information Officer

STRATEGIC CONCEPT 1: BECOMING DIGITAL

GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>1.1 Architecture and Standards</p> <p>Establish a solid foundation on which to build an enterprise-wide digital framework.</p>	<ul style="list-style-type: none"> a Business Architecture Plan for becoming digital developed. b Technical Architecture Plan for becoming digital developed. c Enterprise content management system for the Legal Department implemented as a first step to enterprise-wide deployment. d Enterprise indexing strategy implemented providing BOE staff with efficient access to information. e Operational recovery to support Digital BOE implemented. f Electronic signatures, records management and retention policies established. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Begin developing Business Architecture Plan for becoming digital. <i>(Expected completion FY 09/10)</i> (1 - 11) 2 Begin developing Request for Offers (RFO) for Digital BOE Master Plan and indexing strategy. <i>(Expected completion FY 09/10)</i> (3, 6, 7) 3 Developed an initial technical architecture, documented standards, and implemented an enterprise content management system with search capability for the Legal Department project. (3*, 6, 7) 4 Begin reviewing and developing BOE operational recovery functionality for Digital BOE. <i>(Expected completion FY 09/10)</i> (3*, 7, 8) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Develop Digital BOE Master Plan. (1 - 11) 2 Develop indexing strategy for BOE information in the enterprise content management system. (1 - 10) 3 Implement BOE operational recovery functionality for Digital BOE. (3*, 7, 8) 4 Develop/modify policies for electronic signatures, records management and retention. (3, 6, 7, 8) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 To be determined based on priorities set by Digital BOE Master Plan. <p>FY 11/12</p> <ul style="list-style-type: none"> 1 To be determined based on priorities set by Digital BOE Master Plan. 	<p>Liz Houser</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>1.2 Capture Incoming Data in Digital Form Provide the proper mechanism(s) to ensure that all BOE incoming data is captured in digital form.</p>	<ul style="list-style-type: none"> a Feasibility Study Report (FSR) and Budget Change Proposal (BCP) for Return Processing Efficiencies (RPE) project completed. b Partnership charter with Employment Development Department (EDD) completed. c Interagency Agreement (IAA) with EDD completed. d All payment vouchers processed by EDD beginning in FY 10/11. e Records management and retention processes for Legal Department implemented. f Method for implementing enterprise records management and work flow developed. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Developed FSR and BCP for RPE payment voucher processing project. (1, 2, 3, 6, 7, 11) 2 Begin developing partnership charter with EDD. <i>(Expected completion FY 09/10)</i> (1, 2, 3, 6, 7, 11) 3 Begin developing IAA with EDD for RPE project. <i>(Expected completion FY 09/10)</i> (1, 2, 3, 6, 7, 8, 11) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Initiate development activities for RPE project. (1, 2, 3, 6, 7, 8) 2 Implement records management and retention processes for Legal Department. (3, 6, 7) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Implement RPE payment voucher processing at EDD. (1, 2, 3, 4, 7, 8, 11) 2 Develop a repetitive methodology for implementing enterprise records management and work flow. (1, 2, 3, 7) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 To be determined based on priorities set by Digital BOE Master Plan. 	<p>Liz Houser</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>1.3 Convert Existing Paper to Digital Form</p> <p>Develop and implement a plan that will convert all existing BOE paper documents to digital media.</p>	<ul style="list-style-type: none"> a Approximately 1,000,000 pages scanned and indexed in digital format for Legal Department. b Plans to transition subsequent program areas from paper to digital completed and transition begun. c Initial reports available through enterprise content management system. d Savings from reduction in paper usage. e Access to BOE information improved. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Converted and indexed Legal Department paper documents to digital format. (3*, 6, 7) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Develop plans and begin transition of subsequent program areas from paper to digital per Digital BOE Master Plan. (1 - 11) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 To be determined based on priorities set by Digital BOE Master Plan. <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Redirect reports to the enterprise content management system. (1 - 10) 	<p>Liz Houser</p>

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STRATEGIC CONCEPT 2: DATA WITHOUT WALLS

GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>2.1 Enterprise Repository</p> <p>Build an enterprise repository that enables BOE to have a common understanding of our data.</p>	<ul style="list-style-type: none"> a Metadata repository requirements defined. b Metadata collection and maintenance procedures and standards established. c Metadata repository training program established. d Metadata repository implemented. e Charters for data governance and data stewardship programs approved. f Metadata repository definitions available to BOE staff providing a common understanding of BOE data. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Filled data administration vacancies. (7) 2 Begin training data administration staff on existing standards. <i>(Expected completion FY 09/10)</i> (7) 3 Begin work on data administration vision statement, roles, responsibilities, and procedures. <i>(Expected completion FY 09/10)</i> (7) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Identify requirements for metadata repository in conjunction with data warehouse activities for BOE@Glance. (1, 2, 3, 6, 7, 9) 2 Conduct metadata repository proof of concept(s) in conjunction with data warehouse activities for BOE@Glance. (1, 2, 3, 6, 7, 9) 3 Establish data governance and stewardship programs. (1 - 10) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Conduct metadata repository pilot(s) in conjunction with data warehouse activities for BOE@Glance. (1, 2, 3, 6, 7, 9) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Build or acquire and populate metadata repository. (3, 7) 2 Establish metadata collection and maintenance standards/procedures. (1 - 10) 3 Establish metadata repository training program. (1 - 10) 	<p>Anna Brannen</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>2.2 Organize Data Organize our data to be searchable, geographical, and sharable.</p>	<p>a Library of Services requirements defined. b Library of Services implemented and available to BOE staff. c Web Services training established. d Services Oriented Architecture concepts established. e Local tax allocation improved.</p>	<p>FY 08/09</p> <p>1 No activities.</p> <p>FY 09/10</p> <p>1 Identify requirements for Library of Services (Web Services and other application interfaces). (1, 2, 3*, 7, 9) 2 Conduct Library of Services proof of concept(s). (1, 2, 3*, 7, 9) 3 Establish the concepts of Services Oriented Architecture. (7)</p> <p>FY 10/11</p> <p>1 Conduct Library of Services pilot(s). (1 - 10) 2 Identify requirements for geographical data for tax processing, reporting, and allocation. (1, 2, 7, 9)</p> <p>FY 11/12</p> <p>1 Build or acquire a Library of Services. (1 - 10) 2 Establish maintenance procedures for Library of Services. (1 - 10) 3 Establish Web Services training program. (1 - 10)</p>	<p>Anna Brannen</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>2.3 Develop Services Develop services for the access and exchange of our data.</p>	<ul style="list-style-type: none"> a Secure data exchange infrastructure with other agencies established. b Requirements for secure data exchange technical architecture gathered. c Savings from use of fixed cost platform realized. d Savings from use of open-source desktop software realized. e BOE staff have cost-effective direct access to Integrated Revenue Information System (IRIS) data on a fixed cost platform for reporting needs. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Begin work on leveraging partnerships with Franchise Tax Board (FTB) and Employment Development Department (EDD) to establish a secure data exchange infrastructure. <i>(This is an ongoing effort by the Joint Agency Data Sharing team.)</i> (1, 2, 7, 9) 2 Begin pilot for real time replication of IRIS data to a fixed cost platform for view only access. <i>(Expected completion FY 09/10)</i> (1, 2, 7, 9) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Gather requirements for secure data exchange technical architecture. (1, 2, 3*, 7, 9) 2 Create standards/procedures and provide training for usage of fixed cost platform. (7) 3 Expand and leverage fixed cost platform for view access only. (1, 2, 7, 9) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Conduct proof of concept(s) and pilot(s) of secure data exchange infrastructure established with other agencies. (1, 2, 3*, 7, 9) 2 Pilot industry standard interface(s) on fixed cost platform for view access only. (1, 2, 3*, 7, 9) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Build or acquire the secure data exchange infrastructure established with other agencies. (1, 2, 3, 7, 9) 2 Acquire industry standard interface(s) for fixed cost platform for view access only. (3, 7) 3 Create standards/procedures and training program for usage of industry standard interface on fixed cost platform. (1 - 10) 4 Perform proof of concept with open-source desktop reporting software using fixed cost platform. (1 - 10) 	<p>Anna Brannen</p>

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STRATEGIC CONCEPT 3: BOE@GLANCE

GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>3.1 Construct a Data Warehouse and Provide Analytical Tools</p> <p>Identify and leverage a phased approach to testing, validating, and populating a BOE data warehouse, with relevant analytical tools to properly mine the data.</p>	<ul style="list-style-type: none"> a Data Warehouse Master Plan completed. b Formation of a team for ongoing enterprise data warehouse and business intelligence efforts. c Enterprise data warehouse pilot completed. d Business intelligence product configured and implemented. e Increase in accounts receivable collections due to enhanced collection modeling. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Procured services to conduct assessment and make recommendation for enterprise data warehousing capability at BOE. (1, 2, 3, 6, 7, 9) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Conduct assessment of enterprise data warehouse capability. (1, 2, 3, 6, 7, 8, 9) 2 Assemble team for ongoing enterprise data warehouse and business intelligence efforts. (1, 2, 3, 6, 7, 8, 9) 3 Implement collection modeling data mart. (1, 2, 3*, 7) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Assemble enterprise data warehouse pilot team and conduct pilot project. (1, 2, 3, 6, 7, 9) 2 Implement initial phase of proposed solution from enterprise data warehouse and business intelligence assessment. (1, 2, 3, 6, 7, 9) 3 Evaluate and select business intelligence/analytical product(s). (1, 2, 3, 6, 7, 9) 4 Implement and configure business intelligence product for initial data source(s) loaded into enterprise data warehouse. (1, 2, 3, 6, 7, 9) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Conduct next phase of proposed solution from enterprise data warehouse assessment. (1, 2, 3, 6, 7, 9) 	<p>Randie Henry</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>3.2 Create Business Oriented Views and Standard Reports of Our Information</p> <p>Develop selective views of data to support decision analytics and reporting for BOE stakeholders and employees.</p>	<ul style="list-style-type: none"> a Data sources, views, and reports identified. b Information about initial data sources and reports available in metadata repository. c Access to metadata repository established. d Access to enterprise data warehouse established. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 No activities. <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Conduct facilitated sessions with business to identify data sources, views, and reports. (1, 2, 3, 6, 7, 9, 11) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Input information about data sources and reports into a metadata repository in conjunction with activities for Data Without Walls. (1, 2, 3, 6, 7, 9) 2 Provide access to metadata repository in conjunction with activities for Data Without Walls. (1, 2, 3, 6, 7, 9) 3 Provide access to enterprise data warehouse via business intelligence tool(s). (1, 2, 3, 6, 7, 9, 11) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Update metadata repository with information about next data source(s) to be added to the data warehouse in conjunction with activities for Data Without Walls. (1, 2, 3, 6, 7, 9) 	<p>Randie Henry</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>3.3 Permit Ad Hoc and "What if" Analysis for Our Decision Makers</p> <p>Improve decision making capabilities by pulling information out of BOE data through the use of tools such as trend analysis, modeling and planning, and "what if" analysis.</p>	<ul style="list-style-type: none"> a BOE staff trained on business intelligence processes and tools. b Use of analytical tool(s) broadened. c Ability to define and track performance metrics enhanced. d Monitoring of program performance enhanced. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 No activities. <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Conduct business analytics with existing tools for collection modeling data mart. (1, 2, 3, 6, 7, 9, 11) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Train business and Information Technology (IT) users on business intelligence processes and tools. (1, 2, 3, 6, 7, 9, 11) 2 Tailor business intelligence tool(s) for various levels of BOE organization. (1, 2, 3, 6, 7, 9, 11) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Input information from next set of data source(s) to be added to the enterprise data warehouse and tailor business intelligence tool(s) as needed. (1, 2, 3, 6, 7, 9) 	<p>Randie Henry</p>

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STRATEGIC CONCEPT 4: BOE MYWAY

GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>4.1 Provide a Customizable Website for Taxpayers</p> <p>Provide taxpayers with a website tailored to assist with access to relevant information and appropriate transactions, hence facilitating voluntary compliance.</p>	<p>a Taxpayers are able to register for permits and licenses online and perform account maintenance.</p> <p>b eFiling is expanded to the following tax and fee programs:</p> <ul style="list-style-type: none"> • Fuel Distributors and Retailers • Electronic Waste Recycling Fee (eWaste) • Underground Storage Tank Fee • California Tire Fee • Cigarette Manufacturers and Distributors <p>c Clients with zero reportable transactions are able to select a "No Transaction" option.</p> <p>d Taxpayers are able to submit online requests for:</p> <ul style="list-style-type: none"> • Extension • Relief of Penalty/Interest • Declaration of Timely Mailing • Installment Payment Agreement • Renewal of Cigarette and Fuel license • Refund • Petition <p>e Clients are able to make electronic payments for any financial obligation.</p>	<p>FY 08/09</p> <ol style="list-style-type: none"> 1 Begin development of system changes to provide the ability to electronically register for tax and fee programs administered by the BOE. <i>(Expected completion FY 10/11, Electronic Services Expansion Project [ESEP]).</i> (1, 2, 3*, 7) 2 Begin development of system changes to provide the ability to electronically submit Fuel Distributor/Retailer Returns. <i>(Expected completion FY 09/10, ESEP)</i> (1, 2, 3*, 7) 3 Provided the ability to validate fuel filings prior to actual file submission. <i>Automated Schedule Processing System Update Project (ASP)</i> (2, 7) <p>FY 09/10</p> <ol style="list-style-type: none"> 1 Provide the ability to electronically submit eWaste, Underground Storage Tank, and California Tire Fee Returns. <i>ESEP</i> (2, 3*, 7) 2 Provide the ability to electronically submit Extension, Relief of Penalty/Interest, and Declaration of Timely Mailing Request forms. <i>ESEP</i> (1, 2, 3*, 7) 3 Provide the ability to electronically submit Requests for Installment Payment Agreements. <i>ESEP</i> (1, 2, 3*, 7) 4 Provide the ability to electronically submit Cigarette Manufacturer/Distributor Returns and Schedules. <i>ESEP</i> (2, 3*, 7) 5 Provide the ability to electronically submit fuel filings via a web interface. <i>ASP</i> (2, 7) 	David Gau

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		<p>FY 10/11</p> <ol style="list-style-type: none"> 1 Provide the ability for clients with zero reportable transactions to select a "No Transaction" option via web enabled devices. (1, 2, 7) 2 Provide clients a summary view of all accounts for which they have permission. (1, 2, 3*, 7) 3 Provide a service for clients to make electronic payments for any financial obligation. (1, 2, 3*, 7) <p>FY 11/12</p> <ol style="list-style-type: none"> 1 Provide the ability to perform account maintenance. (1, 2, 3*, 7) 2 Provide the ability to retrieve a statement of account. (1, 2, 3*, 7) 3 Provide the ability to create and maintain permissions for eClients. (1, 2, 3*, 7) 4 Provide the ability to electronically request International Fuel Trade Agreement decal renewals. (1, 2, 7) 5 Provide the ability to electronically request a refund. (1, 2, 3*, 7) 6 Provide the ability to electronically submit a petition. (1, 2, 3*, 7) 	David Gau

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>4.2 Support Different Communication Methods for Our Taxpayers Based on Their Preferences</p> <p>Support multiple channels/devices for taxpayer communications using consistent information and procedures.</p>	<ul style="list-style-type: none"> a Clients are able to verify permits via mobile devices. b Services for selected channels/devices are expanded. c Forms and publications are available via supported channels/devices. d Clients are able to select personal preferences for interacting with BOE. e Security framework is enhanced for additional channels/devices. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Begin development of system changes to provide a mobile device service to verify permits. <i>(Expected completion FY 09/10)</i> (1, 2, 7) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Expand services for supported channels/devices. (1, 2, 3*, 7) 2 Expand support for additional channels/devices. (1, 2, 3*, 7) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Provide the ability to search, download, and display forms and publications via supported channels/devices. (1, 2, 4, 7) 2 Enhance security framework to support channels/devices for services requiring authentication. (1, 2, 3*, 7) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Provide clients the ability to select and save personal preferences for interacting with BOE. (1, 2, 3*, 7) 	<p>David Gau</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>4.3 Offer Taxpayers Information Useful to Their Business</p> <p>Provide an information rich environment for California businesses and taxpayers; produce a community BOE forum for taxpayers under a new service.</p>	<ul style="list-style-type: none"> a Public is able to view instructional videos. b Information currently available on compact discs is provided via supported channels/devices. c Public and other agencies are able to view and participate in BOE Internet forum. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 No activities. <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Provide instructional videos via media sharing such as "YouTube": (1, 2, 3, 4, 7) 2 Research potential BOE Internet forum to allow sharing of information with public and other agencies. (1 - 10) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Provide information currently available on compact discs through supported channels/devices. (1, 2, 7) 2 Prepare recommendation for implementation of BOE Internet forum. (1 - 10) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Develop BOE Internet forum. (1 - 10) 	<p>David Gau</p>

(1) SALES AND USE TAX DEPARTMENT; (2) PROPERTY AND SPECIAL TAXES DEPARTMENT; (3) ADMINISTRATION DEPARTMENT; (3*) ISO;
(4) EXTERNAL AFFAIRS DEPARTMENT; (5) TAXPAYERS' RIGHTS ADVOCATE OFFICE; (6) LEGAL DEPARTMENT; (7) TECHNOLOGY SERVICES DIVISION;
(8) INTERNAL SECURITY AND AUDIT DIVISION; (9) LEGISLATIVE AND RESEARCH DIVISION; (10) BOARD PROCEEDINGS DIVISION; (11) EXECUTIVE TEAM
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STRATEGIC CONCEPT 5: BOE WORKS

GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>5.1 Modernize the Look and Feel of BOE's Current Systems</p> <p>Improve productivity and efficiency by making current systems more accessible, available, and intuitive through the use of Graphical User Interfaces (GUI) for the various user communities.</p>	<ul style="list-style-type: none"> a Modernization plan completed. b Proof of Concept project(s) completed. c Modernization standards approved. d Application development infrastructure enhanced. e GUI pilot completed. f Staff supporting modernized strategies and standards are trained. g BOE staff is provided with a modern interface that allows for increased productivity and ease of usability. h Pool of skilled applicants for desktop application development increased. i Training for desktop development environment readily available. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Begin to provide a modern development environment and tools for application developers. <i>(This is an ongoing activity)</i> (7) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Establish modernization project team. (1, 2, 3*, 7) 2 Explore strategies and develop plan to modernize BOE systems. (1, 2, 3*, 7) 3 Initiate proof of concept(s) and evaluate results for GUI to IRIS. (1, 2, 3*, 7) 4 Evaluate, select, and implement desktop application development tools to replace the agency's current desktop development environment. (7) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Adopt a modernization strategy. (1 - 11) 2 Develop application infrastructure to support modernization strategy. (3*, 7) 3 Develop and update standards to modernize IRIS. (3*, 7) 4 Conduct a pilot for GUI to IRIS and document results. (1 - 10) 5 Initiate and prioritize an iterative approach to implement projects based on established modernization plan priorities. (1 - 11) 6 Develop training plan for technical staff to support approved modernized strategies and standards. (7) 7 Develop or procure training for technical staff. (3, 6, 7) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Begin implementation of selected modernization strategy based on modernization plan priorities. (1 - 11) 2 Evaluate measures of success and adjust modernization strategy, as needed. (7) 	<p>Anita Gore</p>

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 (8) INTERNAL SECURITY AND AUDIT DIVISION; (9) LEGISLATIVE AND RESEARCH DIVISION; (10) BOARD PROCEEDINGS DIVISION; (11) EXECUTIVE TEAM
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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>5.2 Provide a Mobile Work Environment for Our Employees</p> <p>Transform the work environment at BOE by providing the technology and supporting tools to enable a rich and rewarding mobile work environment to BOE employees.</p>	<ul style="list-style-type: none"> a Infrastructure exists to support employee mobile work environment. b Opportunity exists for increased participation in the Telework Program. c Expanded online capability to allow a greater number of staff the opportunity for training. d Expanded access to meetings and training via mobile technology. e Ability to web conference between users in multiple locations. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 Continue to work with business regarding Telework Program expansion. <i>(Progress will be incremental)</i> (1 – 11) <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Identify nondigital work documents that are required for a mobile work environment per Digital BOE Master Plan. (1 – 10) 2 Modify technology refresh to support mobile work environment. (3*, 7) 3 Evaluate existing infrastructure for a secure and scaleable mobile work environment. (1 - 10) 4 Continue to evaluate web conferencing technology and make recommendations for modernization. (3*, 7) 5 Evaluate and recommend enhanced wireless technology to enable work mobility. (3*, 7) 6 Enhance computer based training and access to webinars. (3, 7) <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Purchase and deploy enhanced web conferencing technology. (1 – 10) 2 Purchase recommended wireless technology. (3, 7) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Conduct ongoing evaluations and make recommendations to accommodate emerging mobile technologies. (1 - 10) 	<p>Anita Gore</p>

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GOAL	POTENTIAL MEASURES OF SUCCESS	KEY ACTIVITIES	EXECUTIVE SPONSOR
<p>5.3 Give Employees Self-Service Access to Administrative Processes</p> <p>Improve and modernize BOE specific "back office" administrative systems by planning for enhancements, replacement, or alignment with other state agencies.</p>	<ul style="list-style-type: none"> a Analysis of current BOE administrative processes completed. b Plan for BOE self-service access to administrative processes developed. c Assessment of BOE alignment with statewide initiatives completed. d Initial back office administrative system(s) implemented. 	<p>FY 08/09</p> <ul style="list-style-type: none"> 1 No activities. <p>FY 09/10</p> <ul style="list-style-type: none"> 1 Establish a team to evaluate and recommend administrative enhancements. (1 - 10) 2 Identify and prioritize existing BOE administrative processes that are candidates for self-service access. (1 - 11) 3 Review and align BOE to statewide initiatives. (3, 7) <ul style="list-style-type: none"> • MyCalPAYS • FI\$Cal <p>FY 10/11</p> <ul style="list-style-type: none"> 1 Implement self-service access based on identified priorities. (3, 7) <p>FY 11/12</p> <ul style="list-style-type: none"> 1 Review and align BOE to current statewide initiatives. (3, 7) 	<p>Anita Gore</p>

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APPENDICES

APPENDIX A Strategic Concept 1: Becoming Digital

APPENDIX B Strategic Concept 2: Data Without Walls

APPENDIX C Strategic Concept 3: BOE@Glance

APPENDIX D Strategic Concept 4: BOE MyWay

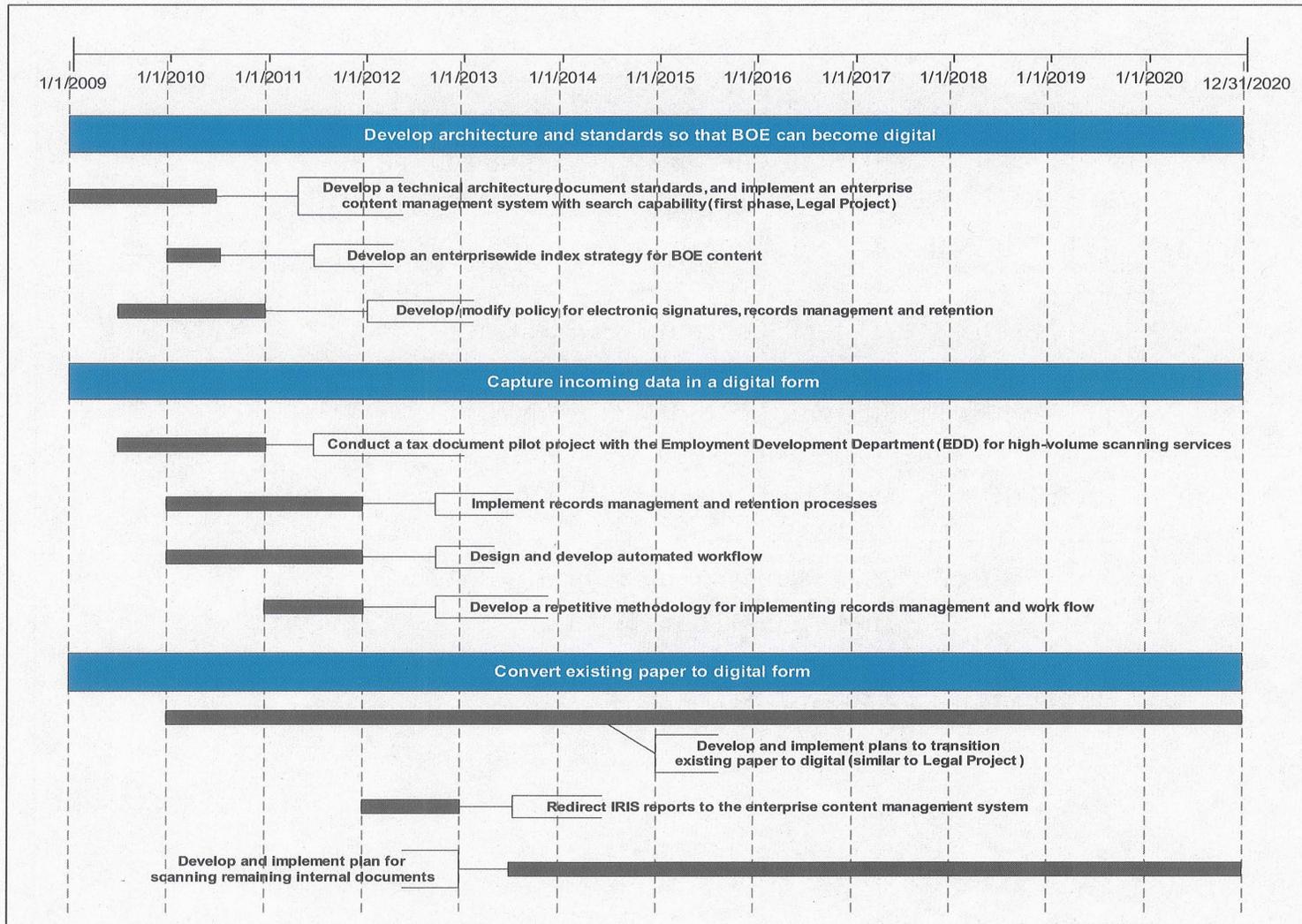
APPENDIX E Strategic Concept 5: BOE Works

APPENDIX F 2020 Plan Strategic Concepts Relative to
Three Year Business Plan

APPENDIX G Glossary of Terms

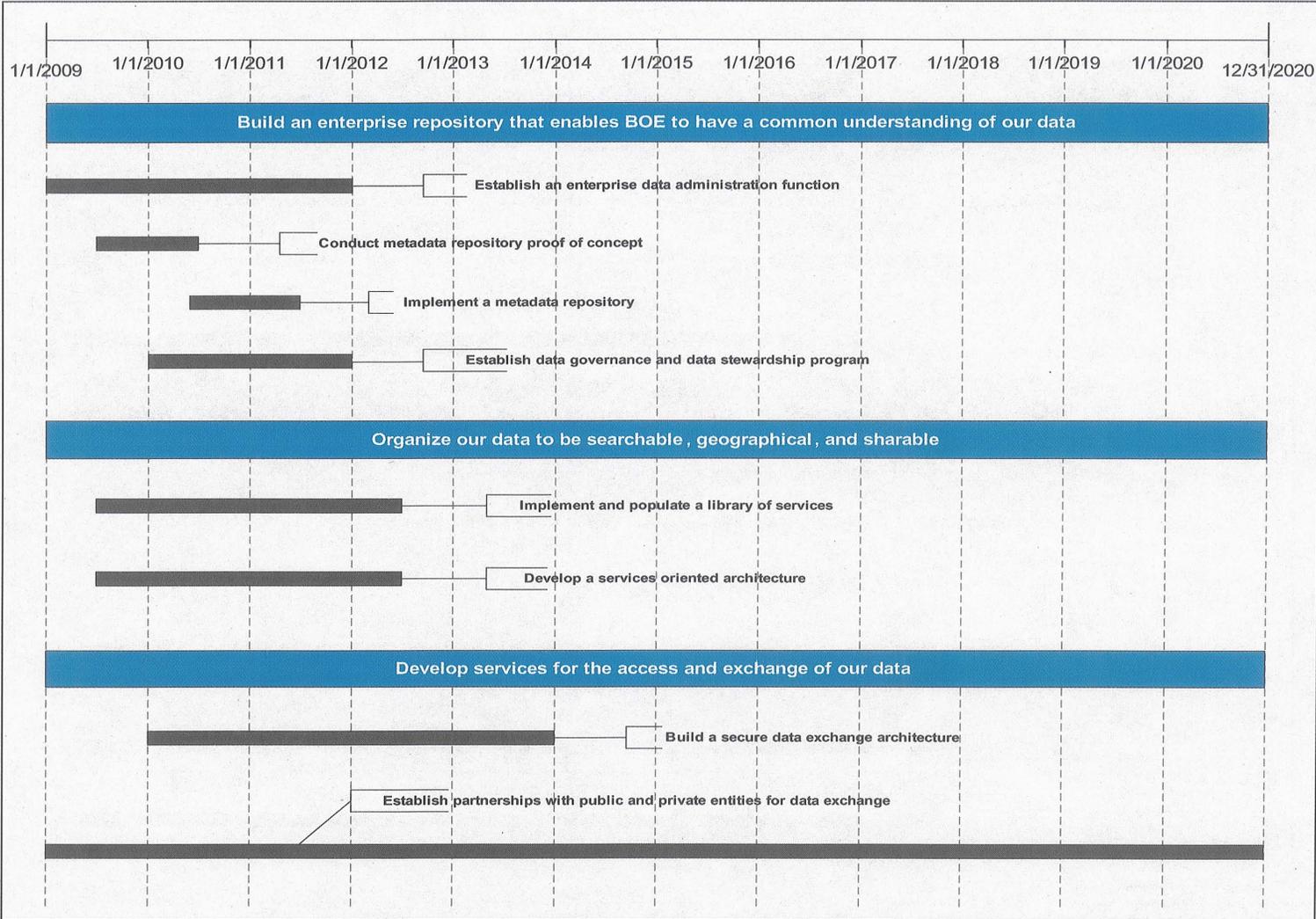
APPENDIX A

Strategic Concept 1: Becoming Digital



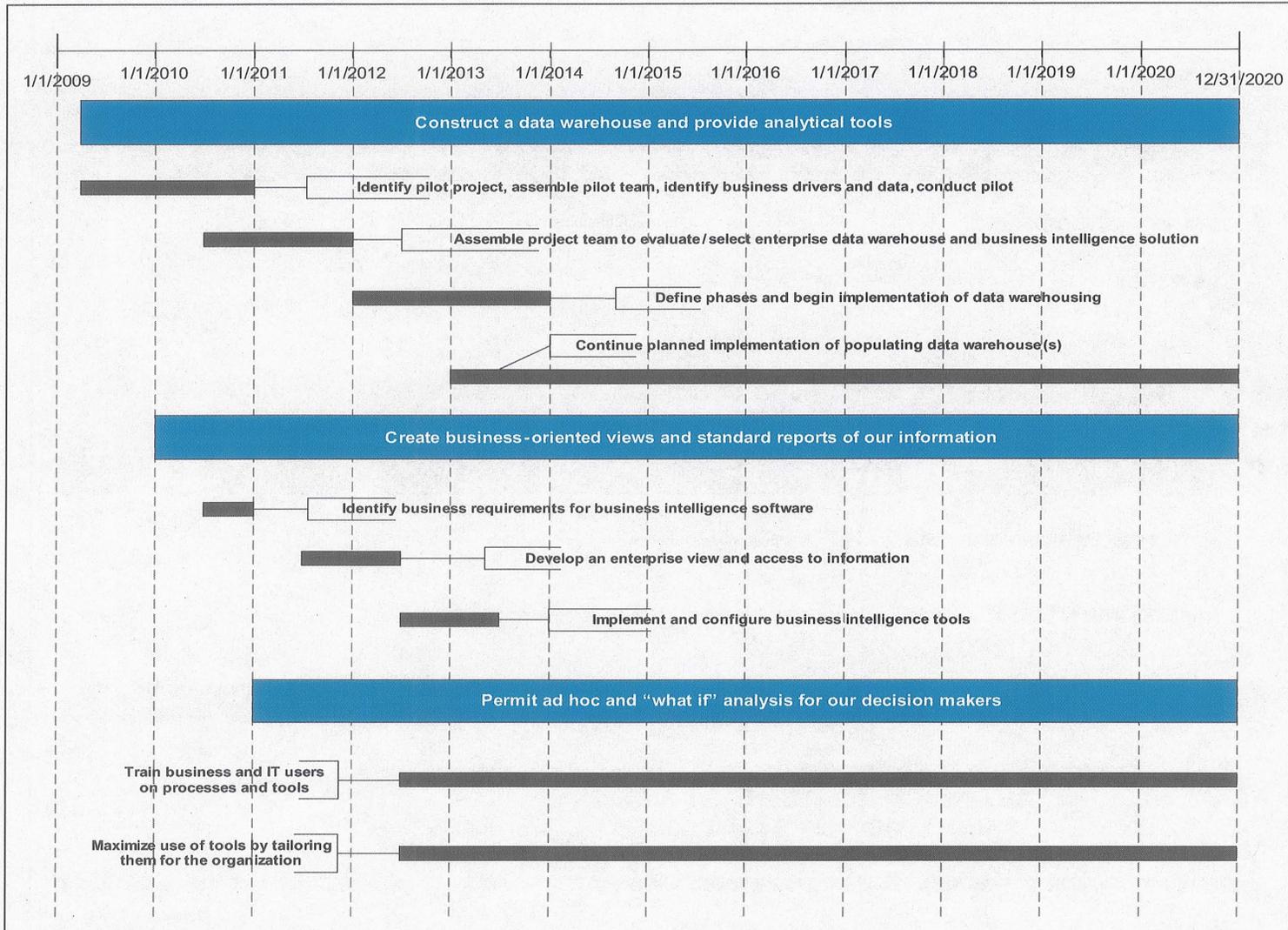
APPENDIX B

Strategic Concept 2: Data Without Walls



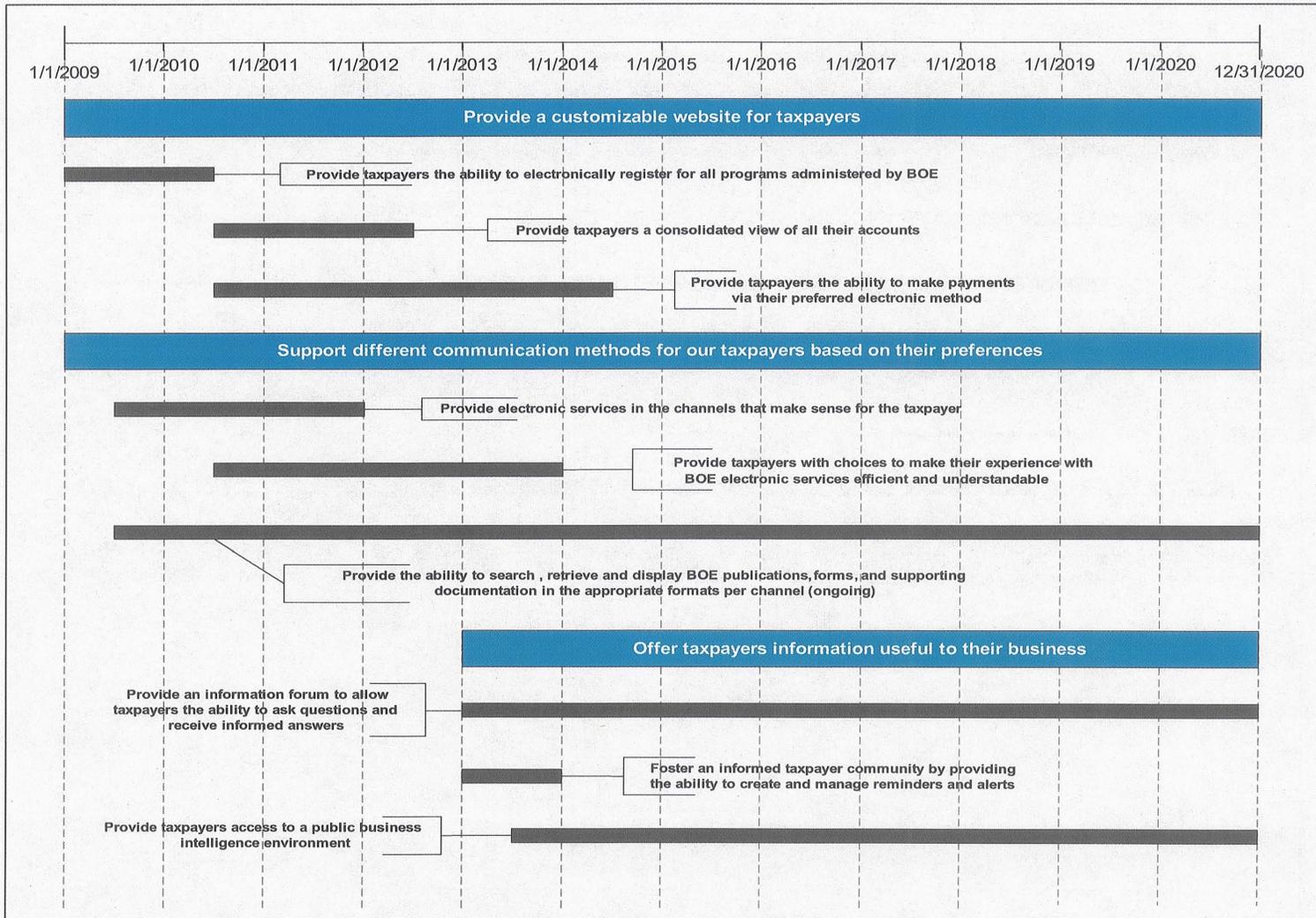
APPENDIX C

Strategic Concept 3: BOE@Glance



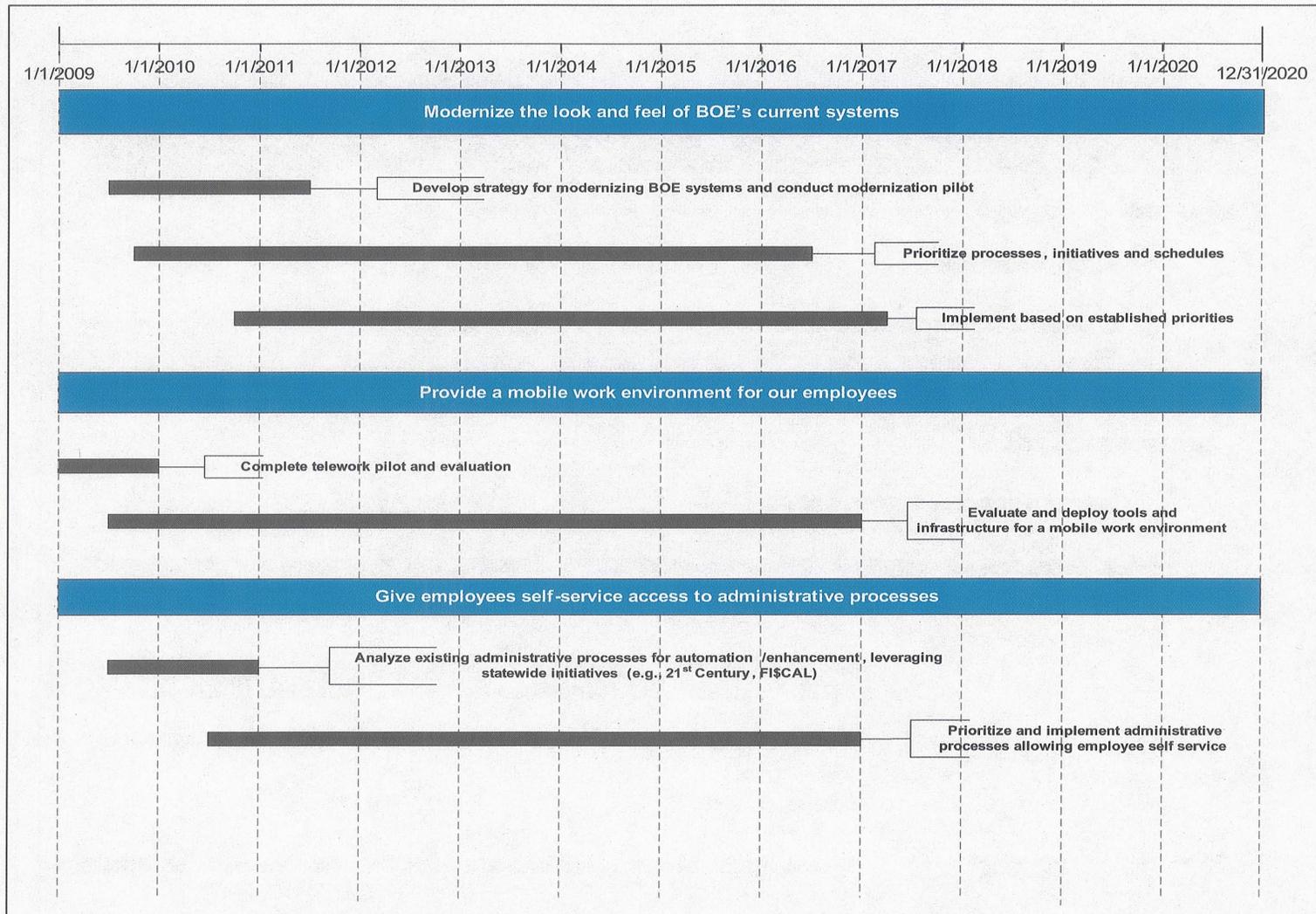
APPENDIX D

Strategic Concept 4: BOE MyWay



APPENDIX E

Strategic Concept 5: BOE Works



APPENDIX F

**2020 Plan Strategic Concepts Relative to Three Year Business Plan
for Fiscal Years 2008-2011**

Each of the 2020 Plan strategic concepts supports a number of the business plan objectives as denoted in this table.

Three Year Business Plan Objective Fiscal Years 2008-2011	2020 Plan Strategic Concept				
	1. Becoming Digital	2. Data Without Walls	3. BOE@Glance	4. BOE MyWay	5. BOE Works
1.1 Reduce the Tax Gap Ensure all taxpayers doing business in California are properly registered to collect and report tax, thus ensuring a fair business environment for all retailers.	✓	✓	✓	✓	
1.2 Increase Collections of Accounts Receivable Identify and implement new and innovative ways to increase the collection of accounts receivables.	✓	✓	✓	✓	✓
1.3 Improve Interagency Partnerships Improve exchanges of information with key federal, state, and local governmental agencies, as well as internal data exchanges to enhance our compliance activities.	✓	✓	✓	✓	
2.1 Expand eServices Increase the availability and use of electronic means for taxpayers to register, report, and access to their account information.		✓		✓	

2020 Plan Strategic Concepts Relative to Three Year Business Plan for Fiscal Years 2008-2011

Each of the 2020 Plan strategic concepts supports a number of the business plan objectives as denoted in this table.

Three Year Business Plan Objective Fiscal Years 2008-2011	2020 Plan Strategic Concept				
	1. Becoming Digital	2. Data Without Walls	3. BOE@Glance	4. BOE MyWay	5. BOE Works
2.2 Build Best Practices Instill innovation, continuous improvement, and best practices throughout the organization as we conduct our daily business and implement new programs.	✓	✓	✓	✓	✓
2.3 Expand Environmental Stewardship Enhance BOE Environmental Stewardship by reducing the use of paper, improved recycling, and identifying other opportunities or reduce waste.	✓		✓	✓	✓
3.1 Expand Communication through Web Services Through the BOE Website increase usability, simplicity in operation, and direct access to the information which stake holders need to comply with the tax programs BOE administers.	✓	✓		✓	
3.2 Improve Taxpayer Education and Outreach Actively develop new and innovative ways of educating taxpayers about the laws which the BOE administers.			✓	✓	
3.3 Ensure Taxpayers' Rights Protection Preserve taxpayer rights through education, outreach, and continued assistance in policy development.					

2020 Plan Strategic Concepts Relative to Three Year Business Plan for Fiscal Years 2008-2011

Each of the 2020 Plan strategic concepts supports a number of the business plan objectives as denoted in this table.

Three Year Business Plan Objective Fiscal Years 2008-2011	2020 Plan Strategic Concept				
	1. Becoming Digital	2. Data Without Walls	3. BOE@Glance	4. BOE MyWay	5. BOE Works
4.1 Implement Digital BOE Provide BOE with the ability to work "Anyway, Anytime, and Anyplace."	✓	✓	✓	✓	✓
4.2 Create a Technology Roadmap Establish a vision and roadmap for the future of BOE's Technology Infrastructure.	✓	✓	✓	✓	✓
4.3 Leverage Technology Leverage technology to meet program and business needs.	✓	✓	✓	✓	✓
5.1 Improve Recruitment, Retention, and Upward Mobility Actively pursue ways to maintain and improve a positive and healthy work environment including the tools necessary for staff to further develop their skills for future promotions.			✓		✓
5.2 Create a Succession Plan Establish and implement an effective Succession Plan.					
5.3 Implement HR Modernization Prepare for statewide HR modernization process, evaluate current BOE classifications, and implement changes necessary to improve consistency within BOE and those used by our sister taxing agencies.					

APPENDIX G Glossary of Terms

TERM	DEFINITION
Account Maintenance	Account maintenance is the ability to maintain Board of Equalization (BOE) taxpayer account information.
Application Infrastructure	Application infrastructure is the component that provides the foundation for the development and maintenance of computer applications, including: computers, networks, communication protocols, security protocols, operating systems, database management systems, application languages, application version control, and other hardware and software integral to supporting applications development.
Automated Schedule Processing (ASP) System Updates Project	The Automated Schedule Processing (ASP) System Updates project provides for enhancements to the Fuel Taxes reporting system and is reportable to the Department of Finance and Office of Chief Information Officer.
Back Office	The back office is generally considered to be the resources required to manage a company and includes technology, human resources, and accounting departments.
Back-file Conversion	Back-file conversion is the process of scanning legacy paper files and documents into a digital image. As a digital image, the legacy paper can be incorporated into an Enterprise Content Management System for management, storage, preserving, and delivery across the enterprise.
Business Analytics	Business analytics are defined as the extensive use of data, statistical and quantitative analysis, explanatory and predictive modeling, and fact-based management to drive decision making. Analytics may be used as input for human or automated decisions and can answer the questions: why is this happening; what if these trends continue; what will happen next; and so on. (Source: Wikipedia)
Business Architecture	Business architecture is a process or model that provides a common understanding of the organization and is used to align strategic objectives and tactical demands. It articulates the structure of an enterprise in terms of its capabilities, governance structure, business processes, and business information. (Source: Wikipedia)
Channel	Channel is a method of information transmission.
Client	Client is a tax and feepayer or authorized representative.

TERM	DEFINITION
Collection Modeling	Collection modeling is the risk assessment model used within the Automated Compliance Management System (ACMS) to score accounts receivables into modeling groups.
Customizable Website	A customizable website provides the user with the ability to customize screen layout and content based on individual preference.
Data Administration	Data administration is the management of corporate data through strategic data planning, data element standardization, data synchronization, data sharing, data maintenance, and data relationship. (Source: Technology Services Division (TSD) SurfBoard)
Data Governance	Data governance is an emerging discipline which embodies data quality, data management, business process management, and risk management of data in an organization. (Source: Wikipedia)
Data Mining	Data mining is the process of extracting hidden patterns from data to transform data into information. (Source: Wikipedia)
Data Sharing Infrastructure	Data sharing infrastructure is the software, hardware, and protocols used to allow authorized users access to data from any connected computer using a universal set of protocols and formats.
Data Stewardship	Data stewardship is accountability for the quality of information resources. Individuals within an organization may hold one or more data stewardship roles such as modeling, defining, creating, and maintaining quality information.
Data Warehouse Master Plan	The Data Warehouse Master Plan is an assessment of BOE's readiness and capability to develop an enterprise data warehouse and increase the use of business intelligence tools. It encompasses an analysis of the major business objectives, operational needs, and supporting data sources for inclusion in the data warehouse. Additionally, it includes a gap analysis of BOE's existing analytical tools, applications, and supporting data infrastructure compared to what is necessary to accomplish the business goals and strategies. (Source: Data Warehouse Master Plan Request for Offer #BOE 08-232)
Device	Device is any type of equipment used by the client to access information.
Digital (digital content)	The word digital is most commonly used in computing and electronics, where information such as images, audio, or photography are captured and stored in digital format.
Digital BOE Master Plan	The Digital BOE Master Plan is a strategic approach for BOE to become digital. It identifies and prioritizes business processes for conversion to fully automated processes utilizing digital imagery and automated workflows.

TERM	DEFINITION
eClient Maintenance	eClient maintenance is the ability for clients to authorize and maintain electronic access to their accounts.
eClients	eClients are clients who have permission to perform authorized electronic services.
Electronic Services Expansion Project (ESEP)	The Electronic Services Expansion Project (ESEP) expands BOE's existing eServices infrastructure to provide new functionality to tax and feepayers and is reportable to the Department of Finance and Office of Chief Information Officer.
Enterprise Content Management System (ECMS)	The Enterprise Content Management System (ECMS) consists of the technologies, tools, and methods used to capture, manage, store, preserve, and deliver digital content across an enterprise. (Source: AIIM)
Enterprise-Wide Index Strategy	An enterprise-wide index strategy is a strategy for cataloging digital content at the enterprise level to facilitate locating and retrieving information from the ECMS.
Financial Information System for California Fi\$Cal	The Financial Information System for California (Fi\$Cal) is a business transformation project for State government in the areas of budgeting, accounting, and procurement. Fi\$Cal is a partnership of the Department of Finance, the State Controller's Office, the State Treasurer's Office and the Department of General Services. This project prepares the state's systems and workforce to function in an integrated financial management system environment. (Source: www.fiscal.ca.gov)
Fixed Cost Platform	A fixed cost platform is a computing environment that has a fixed monthly cost regardless of usage. A Windows server is an example of a fixed cost platform whereas a mainframe environment has variable monthly costs based upon usage.
Geographical Data	Geographical data is a composite of spatial and descriptive data. An example would be overlaying tax code information on a map of California. Spatial data is the map and descriptive data is the tax code information.
Graphical User Interface (GUI)	A graphical user interface (GUI) allows interaction with electronic devices via images rather than text commands.
Integrated Revenue Information System (IRIS)	The Integrated Revenue Information System (IRIS) is an electronic business application utilized by BOE to organize and support the collection of California state sales and use tax, fuel, alcohol, and tobacco taxes and fees.
Internet Forum	Internet forum is an online discussion website where topics can be addressed.
Library of Services	A library of services is a catalog of web services and other application programming interfaces that allow for more efficient application development.

TERM	DEFINITION
Metadata	Metadata is the information about data that enables intelligent, efficient access and management of data from creation through long term use. One of the primary purposes of organizing the metadata is to be able to describe and communicate business and technical information to persons within the organization. (Source: TSD SurfBoard)
Mobile Device	Mobile device is a portable computing device with the capability of connecting to the Internet.
Modernization Project Team	The Modernization Project Team is comprised of stakeholders and project managers responsible for oversight of all application development phases for the modernization of IRIS including project planning, development, and implementation.
MyCalPAYS	21st Century Project—MyCalPAYS is a California State Controller’s Office project for state government providing enhanced processes, tools, and information for human resources management. It offers state employees online access to their information. (Source: www.sco.ca.gov)
Open Source Software	Open source software is software distributed under open source licensing agreement. The most commonly known requirement for open source is that the code must be available free of charge and allow modifications that can be redistributed under the same open source licensing agreement. (Source: TSD SurfBoard)
Performance Metrics	Performance metrics are measures of an organization’s activities and performance. Performance metrics should support a range of stakeholder needs from customers and shareholders to employees. Developing performance metrics usually follows a process of: 1. Establishing critical processes/customer requirements; 2. Developing performance measures and goals; 3. Establishing strategic targets for success; and 4. Collecting and comparing performance data to strategic targets. Performance metrics are linked to corporate strategy and are derived in order to measure performance against critical success factors. (Source: Wikipedia)
Pilot Project	A pilot project refers to an initial roll out of a system, targeting a limited scope of the intended final solution. The scope may be limited by the number of users who can access the system, the business processes affected, the business partners involved, or other restrictions as appropriate. The purpose of a pilot project is to validate whether the system is working as it was designed while limiting business exposure. (Source: Answers)
Proof of Concept	A proof of concept is an analysis and testing effort to validate the technical feasibility of a concept, idea, method, or process. The outcome of the proof of concept will determine whether a project is initiated, delayed, or cancelled.
Protocol	In information technology, protocol is a set of rules that govern the interaction of technology components.

TERM	DEFINITION
Real Time Data Replication	Real time data replication is the instantaneous copying of data from one source to one or more target destinations.
Repository	A repository is a place where data is stored.
Return Processing Efficiencies (RPE) Project	The Return Processing Efficiencies (RPE) project will utilize Employment Development Department's (EDD) scanning capabilities to convert efile payment vouchers into digital content. The goal of this project is to capture payment vouchers as digital content that will be routed via automated workflows throughout BOE divisions for simultaneous processing by work groups.
Scalable	Scalable refers to the ability to expand a system to support additional load/volume/capacity by adding resources without significant architectural change. Conversely, a scalable system can be reduced in size by removing resources.
Security Framework	Security framework is the standards and policies that provide information management security controls and procedures.
Service Oriented Architecture	Service Oriented Architecture (SOA) is a collection of services/functions that can reside in various applications on different platforms.
Technical Architecture	Technical architecture describes the structure and functionality of an enterprise system, including the hardware, applications, services, protocols, storage, and networks that connect applications and devices.
Technology Refresh	Technology refresh is the periodic replacement of components of the technical architecture to ensure continuing reliability and improved performance and capacity.
TSD SurfBoard	SurfBoard is TSD's internal intranet site for technology project information and documentation. It provides an electronic means to share information with project teams and interested stakeholders.
Web Services	Web services are software systems designed to support interaction and communication between applications.
Webinar	Webinar is a web-based presentation, lecture, workshop, or seminar that is transmitted over the web and is often interactive, meaning that participants can give, receive, and discuss information. (Source: Webopedia)
YouTube	YouTube is a video-sharing website on which users can upload and share videos.

