

STRATEGIC MANAGEMENT PLAN

2015-2020



LEARN ABOUT US

MISSION

The mission of the Board of Equalization is to serve the public through fair, effective, and efficient tax administration. The BOE administers tax and fee programs; adopts rules and regulations to clarify tax laws; decides appeals of property, business and income tax assessments; assesses and allocates property values of railroads and specified utilities; and oversees the property tax assessment practices of all 58 county assessors.

VISION

A BOE where together people and technology achieve the mission of the agency and deliver superior customer service through transformed business processes and organizational structure.

CORE VALUES

As we carry out our mission, we live by these core values both collectively and individually:

We Put People First

- **Customer Focus** – We focus on meeting our customers' needs and exceeding their expectations. We design our communications, products, services and processes with the customer in mind.
- **Collaboration** – We support and respect each other. We use our individual skills and abilities collaboratively to achieve BOE's goals, and celebrate our successes. We communicate honestly, openly, and often.

We Are Committed to Excellence

- **Integrity** – We promote a culture of excellence and commit to the highest degree of ethical conduct in the performance of our work. The integrity we exhibit establishes trust.
- **Dedication** – We continuously improve the accuracy, reliability, usefulness, and quality of our products and services. We take pride in and are responsible for our individual performance and work product.

We Keep Getting Better

- **Innovation** – We are devoted to constant innovation and improvement in our services. We value new ideas and turn them into reality. We empower staff to be forward thinking, risk taking and creative. We embrace and drive change.
- **Growth and Learning** – We are life-long learners. We constantly pursue education, training and professional development.

GOALS

1 Maximize Voluntary Compliance

Increase the percentage of taxpayers that file and pay accurately and timely by making compliance easy. Provide the tools, information and customer service necessary to help taxpayers understand and fulfill their tax and fee obligations to the BOE.

OBJECTIVES:

- 1.1 Improve our understanding of taxpayer needs and expectations
 - Use data analytics to identify compliance challenges and knowledge gaps
 - Seek taxpayer feedback through multiple forums to continuously evaluate our service delivery
- 1.2 Continually enhance education, outreach, and tools to help taxpayers comply
 - Provide information that is easy to find and understand
 - Proactively reach out to groups where compliance is low
 - Create tools that are easy to use and meet the diverse needs of taxpayers

2 Enhance Operational Effectiveness

Continually improve processes by focusing on the customer and leveraging state-of-the-art technology with an unwavering dedication to taxpayer rights and information security.

OBJECTIVES:

- 2.1 Achieve measurable standards of success for service, effectiveness, and efficiency
 - Use benchmarking to establish meaningful measures of success
 - Manage performance to achieve measures of success
- 2.2 Create a culture of continuous process improvement
 - Use a systematic approach to uniformly implement process improvements
 - Empower staff throughout the agency to improve processes
- 2.3 Integrate state-of-the-art technologies
 - Implement the Centralized Revenue Opportunity System (CROS), the Financial Information System for California (FI\$Cal), and other modern technology solutions
 - Ensure security of taxpayer and employee information

3 Invest in the Organization

Invest in our staff, BOE's number one resource.

OBJECTIVES:

- 3.1 Prepare staff to succeed and lead
 - Prepare, train, and support staff to successfully transition to new technologies and processes
 - Retain and recruit qualified staff to perform the jobs of the future
 - Proactively identify and develop future leaders
 - Provide opportunities for staff to grow and advance
 - Identify and implement methods to memorialize institutional knowledge
- 3.2 Align the organizational structure around core functions
 - Functionally align to increase effectiveness and efficiency
 - Empower staff to improve customer service and performance