

**DRAFT**  
**BOE Strategic Plan**  
**2020 – 2025**  
**Rebuilding, Revitalizing and Modernizing the BOE**  
**DRAFT**

**Mission**

Our mission is to serve Californians through fair, effective and efficient tax administration in support of state and local governments.

**Vision**

To rebuild, revitalize and modernize the BOE, to enrich its employees and strengthen its organizational capabilities to deliver gold-standard services.

**Core Organizational Values**

- Perform public service with integrity
- Put people first
- Commit to excellence
- Keep getting better

**Strategic Plan Goals**

The goals for the strategic planning period of 2020-2025 are focused on rebuilding, revitalizing and modernizing the Board of Equalization to continue the successful administration of our constitutional tax programs. The goals are:

**Goal 1: Revitalize our workforce and rebuild our state agency infrastructure.**

*(A) Workforce Objectives:*

- Improve our recruitment approaches to achieve better outcomes and accomplish more efficient and timely recruitment processes.
- Establish an employee retention program that utilizes proven-best practices and policies for workforce development and career planning.
- Develop and implement succession plans for essential roles and subject matter areas that ensure continuity of knowledge and mitigate risks related to knowledge loss/gaps.
- Create a culture of professional growth and development for future property tax leaders.

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*(B) State Agency Infrastructure Objectives:*

- Identify gaps in BOE’s state administrative functions to develop a plan to restore essential functions and delegation levels.
- Collaborate with the State Personnel Board and CalHR to establish the corrective action plan for restored delegation (human resources and personnel).

**Goal 2: Modernize our core tax administration functions and business processes by leveraging technology systems and process improvement opportunities.**

- Improve data collection and management capabilities related to the survey program to leverage statewide system opportunities.
- Improve website functions and technologies to enhance capabilities and utility.
- Identify innovations to enhance survey relevance and value.

**Goal 3: Establish our standards for subject matter expertise and training programs.**

- Develop the next generation of property tax subject matter expertise to maintain the on-going knowledge and skills needed for property tax administration and statewide oversight.
- Establish a coalition of property tax knowledge expertise to enhance the training programs needed for efficient and effective property tax administration.

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## **About the BOE**

The Board of Equalization oversees the assessment practices of California’s 58 County Assessors, who are charged with establishing values for 12.8 million assessments each year. Additionally, the BOE assesses the property of regulated railroads and specific public utilities and assesses and collects the private railroad car tax; as well as, the assessment of taxes on insurers, and the assessment and collection of excise taxes on the manufacture, importation, and sale of alcoholic beverages.

The Board consists of five Members who serve concurrent four-year terms. One Member is elected from each of California’s four equalization districts. The State Controller, elected at-large, serves as the Board’s fifth Member. Each of the four elected Board Members represents approximately 9.5 million constituents in their respective districts.

The BOE’s Executive Director is appointed by the five-Member Board and is responsible for the employees and carrying out the BOE’s mission, goals, tax administration functions and Board directives.