

## Client Engagement Summary

### Board of Equalization

The California State Board of Equalization (BOE) is the only elected tax commission in the nation. BOE was created by an 1879 constitutional amendment to ensure statewide uniformity in county property tax assessment practices, but assumed a broader role as California moved into the 20th century. Today BOE is charged with administering the sales and use tax and 29 other special tax and fee programs, centrally assessing utility property, setting timber harvest values, hearing business and income tax appeals, and overseeing the assessment practices for real and personal property by California's 58 county assessors. BOE collects taxes and fees that provide more than 34 percent of the annual revenue for state government and essential funding for counties, cities, and special districts. In fiscal year 2006–2007, BOE-administered taxes and fees produced nearly \$54 billion for education, public safety, transportation, housing, health services, social service, and natural resource management.

**Digital BOE Enterprise Architecture** – Between June 2009 and June 2010, Sabot's consultants brought to bear their expertise in system and technical architecture to develop the enterprise architecture (EA) for BOE's strategic concept, *Becoming Digital*. Leveraging our experience with information technology strategic planning and systems analysis, this effort entailed defining the business foundation (aligning IT with the business), identifying the enterprise architecture principles (providing a decision-making framework for future IT decisions), developing the technical architecture reference model (an industry standard taxonomy for IT hardware, software, and systems), and facilitating the identification of the domain principles. Each of these activities relied on Sabot's experience in adapting IT systems' functional business requirements and processes using industry best practices for technical solutions and standards. Sabot led the client through numerous workshops and facilitated sessions to document the underlying requirements and instill the process-oriented nature of EA into BOE. Additionally, we defined the component architecture for specified priorities, conducted a baseline analysis and gap analysis, as well as, developed a 3 year roadmap/migration plan for staffing the BOE EA office and executing the on-going EA processes. These activities required Sabot consultants conduct analyses, evaluations, and recommendations for proper development of systems specifications.

**2020 Strategic Plan** – Between May 2008 and March 2009, Sabot Technologies was engaged by the California Board of Equalization (BOE) to develop a 10 year information technology (IT) strategic plan entitled "BOE of the Future", as well as, a short-term (3 year), actionable tactical plan (Roadmap). Sabot's consultants provided the strategic planning framework, project methodology/approach, project leadership and management, as well as, developed the bulk of the deliverables with input and assistance from client management and staff. During the course of this engagement Sabot designed and facilitated a series of workshops involving BOE executives and staff to identify high-level strategic concepts, mission and vision statements, as well as underlying goals and objectives. The resulting strategic initiatives required extensive stakeholder management and communication activities to ensure on-going buy-in and support. Sabot utilized change management, conflict resolution, and problem-solving methods throughout the engagement. The resulting strategic plan addressed all areas of the IT organization including operations, business processes, systems and applications roadmaps, organizational structure, enterprise architecture governance, and program/project management. Sabot worked extensively with BOE executives to ensure proper alignment of business operations to the resulting strategic plan. Sabot leveraged our expertise in enterprise technical and system architecture in crafting the tactical initiatives. In developing the 3-year tactical plan (Roadmap), Sabot consultants utilized their expertise in program and project management by developing a program in support of "BOE of the Future." This program identified and sequenced the numerous inter-related and dependent initiatives. For each of the projects identified, Sabot developed project descriptions, resource estimates, and durations to allow BOE to include in their agency budget and governance processes.