PRIMARY OPPORTUNITIES				SPECIFIC ACTIONS TAKEN/IN PROCESS	Fully Implemented (and Ongoing)	In Progress	Future Step	OUTCOME/HIGHLIGHTS
Prior Year 2020-21	**Current Year 2021-22**	**PO Identified**	**Primary Action**					
	3.33	Understands my needs and requirements	Strengthen BOC's understanding of client priorities/issues through different outreach strategies	Different are steps being taken to build relationships and better understand client needs/perspective: 1. travel to different county offices to meet with clients 2. attend CD monthly meetings and other cross ANR cttees to build current awareness of client priorities 3. hold monthly county office meetings as a forum for clients to raise issues - Offer similar meetings for our Admin clients 4. reach out to clients to improve communications e.g. by phone, zoom 5. Include a complete signature line on emails that include phone number 6. Assigned a business partner to each client for continuity/relationship management, with expectations to build client engagement 7. Take a joint problem-solving (not compliance driven) approach 8. Cross training of staff to ensure our clients are covered when a team member is out 9. Share Customer Survey Results and Action Plan to address results	2, 3, 4, 5, 6, 7, 9	1, 8		Client needs are better met - Had first site visit - NorCal Visit 5/31. Woodland visit planned for counties in this area for 7/25/23.
	3.11/2.76	Clear Procedures	Provide better access to clear and concise procedures	Utilizing BOC website and workflow automation to: 1. publish policies/procedures/forms 2. streamline and clarify/automate procedures 3. Hold webinars/presentations to clarify policies/procedures, particularly if being changed e.g. Pcard reconciliation 4. Send out reminders/notices in multiple ways - presentation/email/mtgs e.g. fiscal close deadlines	4	1, 2, 4		Clear procedures are provided to clients, resulting in more effective processing. Held first webinar 4/20/23 on Travel. 7/20/23 webinar on Pcard vs. Travel card in process. Created 3 Quick Reference Guides. Created a Quick Reference Guide for Forms needed for Purchasing
	2.97	Approval Workflow Process	Improve our intake, transacation and communications processes	1. A new tool being piloted to manage internal BOC workflow Dedicated resource recruited to support workflow and identify roadblocks/gaps Process to be developed to escalate issues as needed 2. Clearly identifying "business partner" for each client unit - on website 3. 3 BOC forms already implemented on WFA, with 2 more in progress 4. Work with specific units on coordinated processes to streamline/automate e.g. Development, HR, RPM, SWPR,C&G, IT etc	2	3, 4	1	Approvals are processed effectively. Have move Team 5 be set up similar to teams 1-4 where they have a dedicated BP and FA's. Team 6 email set up but not yet published until staff hired.

	2.94	Clarity of Policy	Address with alongside actions on Clear Pro	Utilizing BOC website and workflow automation to: 1. publish policies/procedures/forms 2. streamline and automate procedures 3. Hold webinars/presentations to clarify policies/procedures, particularly if being changed e.g. Pcard reconciliation - Add form description and common reasons to use	3	1, 2		Policies are accessible and clear, resulting in better understanding and adherence
	2.89	Training for Clientele	Implement a multi-audience approach to training	A variety of training approaches are taken: 1. updates at monthly CD mtgs e.g. upcoming on confirming orders 2. reg monthly mtgs with county office mgrs 3. dep on the circ, we also work at the individual level e.g. office mgr changes/vacancies/as req 4. webinars by topic held during last 2 years, either by "series" and as prog/policy changes are rolled out 5. planning to provide onsite, in person-training e.g. 2 day conference, possibly this Fall either centrally (similar to 2017 in Davis) or regionally 6. Create specific webinars for different financial processes that we record and put on the BOC site so clients can refer back and use for new employees	1, 2, 3	4, 5, 6		Clients have mulitple training opportunties, resulting in better administrative practices Held first webinar 4/20/23 on Travel. 7/20/23 webinar on Pcard vs. Travel card in process. Started holding BOC office hours 2x per month.