



Strategic Plan

2026–2030

Supporting Our State. Building Our Future.

Our **MISSION** is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians.



FOUNDATIONAL PRINCIPLES

-  Safeguard the privacy of data entrusted to us and ensure systems are secure to protect taxpayer information and departmental operations.
-  Carry out our fiduciary responsibilities with accuracy and financial integrity.
-  Operate with transparency and professionalism to maintain public trust and confidence.
-  Conduct our business in accordance with the Statement of Principles of Tax Administration, Taxpayers' Bill of Rights, and our organizational values.

VALUES

› Lead with Integrity and Inspiration

As inspirational leaders, we are committed to pursue the right path, communicate clear expectations, and ignite diverse ideas and innovation. We cultivate a culture of belonging, and invite everyone to maximize their potential every day.

› Bring Our Best

By bringing our best we exemplify honesty, inclusivity, credibility, professionalism, and accountability. We respect and value our employees and encourage them to bring their best every day.

› Deliver Excellent Products and Services

Quality is best achieved through collaboration with our diverse customers and each other. We deliver excellent products and services that meet the needs of all our customers.

› Contribute to a Caring Community

We encourage mutual respect, kindness, and teamwork. This creates a supportive and inclusive work environment that values diversity and allows all of us to flourish in the community we work and live in.

› Become Experts at What We Do

We are motivated to continually improve and grow. We take advantage of resources and opportunities to develop in our chosen career path and to help inspire and engage others in our diverse workforce.



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GOAL 1: EXCEPTIONAL SERVICE

Continuously improve our customers' experience.

- 1.1 Evaluate customer experience needs across all service channels; develop and implement solutions to equitably meet those needs.
- 1.2 Champion an organizational culture to achieve positive customer experiences.
- 1.3 Educate our customers and market the availability of multi-channel services and information to improve their experience.

GOAL 2: EFFECTIVE COMPLIANCE

Fairly administer the law to ensure taxpayers file and pay the correct amount.

- 2.1 Identify noncompliant segments and implement campaigns to improve compliance.
- 2.2 Improve data, information, and knowledge sharing with the tax community and government partners.
- 2.3 Improve case selection and timeliness in all compliance programs.

GOAL 3: STRONG ORGANIZATION

We value, challenge, empower, and invest in our employees to have an enterprise view, be experts in their field, and achieve their full potential.

- 3.1 Continue to cultivate, enhance, and market workforce development resources to assist us in recruiting, engaging, and retaining our talented employees.
- 3.2 Increase employee engagement and job satisfaction by continually evaluating and strengthening FTB's culture and values; promoting diversity, equity, inclusion, and accessibility; and recognizing employees as individuals and celebrating their achievements.
- 3.3 Encourage and empower employees to contribute to decision-making by welcoming ideas and input from anyone in the organization.

GOAL 4: OPERATIONAL EXCELLENCE

Optimize our processes, products, services, and resources to best serve our internal and external customers and stakeholders.

- 4.1 Strategically allocate and efficiently utilize budgeted resources at the enterprise level to meet short and long-term operational needs.
- 4.2 Validate and utilize data, as authorized, to make timely decisions and improve business operations.
- 4.3 Modernize and streamline IT systems and processes; and leverage emerging technologies to support and improve business and administrative activities.
- 4.4 Implement proactive security models and adaptable strategies to identify threats, manage risks, and protect customer information and departmental resources.
- 4.5 Standardize and modernize our IT service delivery to optimize operations.
- 4.6 Continue to strengthen physical security to protect our employees, assets, and mission critical operations.
- 4.7 Work with taxpayers and under-served communities, using available data, to ensure that all Californians are aware of their filing and payment obligations, and the availability of free and reliable resources.