

Strategic Plan 2021-2025 (Draft)

Franchise Tax Board Meeting
Friday, September 18, 2020

Slide 1: Strategic Plan 2021-2025 (Draft)

Presenter(s) Name(s): Chrissy Casale and Cathy McCollum – Finance and Executive Services Division

September 18, 2020

Slide 2: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 1 – Taxpayer Centric Service”

- Deleted: *“Taxpayer Centric”*
- Inserted: *“Exceptional”*

New subtitle text reads, *“Exceptional Service”*

Body text:

Old text reads: *“Enhance our services to help taxpayers fulfill their tax obligations.”*

- Deleted: *“services to help taxpayers fulfill their tax obligations”*.
- Inserted: *“Strive to continuously enhance our customers’ experience”*

New body text reads: *“Strive to continuously enhance our customers’ experience.”*

A photo is shown of a woman tapping on her electronic tablet.

Slide 3: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 1 – Exceptional Service”

Body text:

Item 1.1 body text: Old text reads, *“Evaluate customer experience needs across all service channels; develop and implement a roadmap to meet those needs.”*

- Deleted: *“a roadmap”*.
- Inserted: *“solutions”*

Item 1.1 new body text reads, *“Evaluate customer experience needs across all service channels; develop and implement solutions to meet those needs.”*

Item 1.2 body text (no change): *“Champion an organizational culture to achieve positive customer experiences.”*

Item 1.3 body text: Old text reads, “*Promote the use of self-service tools to improve service to our customers.*”

- Deleted: “*Promote the use of self-service tools to improve service to*”
- Inserted: “*Educate*”
- Inserted: “*on the use of multi-channel services and information to improve their experience.*”

Item 1.3 New body text reads, “*Educate our customers on the use of multi-channel services and information to improve their experience.*”

Slide 4: Strategic Plan 2021-2025 (Draft)

Subtitle:

“*Goal 2 – Effective Compliance*” (no change)

Body text:

“*Fairly administer the law to ensure taxpayers file and pay the correct amount.*” (no change)

A photo is shown of three people sitting at a table with documents in front of them.

Slide 5: Strategic Plan 2021-2025 (Draft)

Subtitle:

“*Goal 2 – Effective Compliance*”

Body text:

Item 2.1 body text: Old text reads, “*Identify noncompliant taxpayer segments and customize our actions to improve compliance.*”

- Deleted: “*Identify noncompliant taxpayer segments and customize our actions to improve compliance.*”
- Inserted: “*Strive to continuously enhance our customers’ experience.*”

Item 2.1 New body text reads, “*Identify noncompliant segments and implement campaigns to improve compliance.*”

Item 2.2 body text: Old text reads, “*Discover and implement new approaches to increase compliance in the most egregious areas of abuse.*”

- Deleted: “*Discover and implement new approaches to increase compliance in the most egregious areas of abuse.*”
- Inserted: “*Improve data, information, and knowledge sharing with the tax community and government partners.*”

Slide 6: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 2 – Effective Compliance”

Body text:

Item 2.4 body text: Old text reads, *“Improve case selection in all compliance programs.”*

- Deleted: *“Improve case selection in all compliance programs.”*

Item 2.5 body text: Old text reads, *“Improve timeliness in all compliance programs.”*

- Deleted: *“Improve timeliness in all compliance programs.”*
- Inserted: *“Item 2.3, “Improve case selection and timeliness in all compliance programs.”*

Slide 7: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 3 – Strong Organization” (no change)

Body text:

Old text reads, *“Invest in our employees, challenge and empower them to be experts in their field, and help them achieve their full potential.”*

- Inserted: *“Value”*
- Inserted: *“have an enterprise view”*

New body text reads, *“Value, invest in, challenge, and empower our employees to have an enterprise view, be experts in their field, and achieve their full potential.”*

A photo is shown of a man presenting information from a poster to two women sitting at a desk with papers and an electronic tablet.

Slide 8: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 3 – Strong Organization” (no change)

Body text:

Item 3.1 body text: Old text reads, *“Prioritize and implement the Talent Management Program services to help us recruit, train, and retain our employees.”*

- Deleted: *“Prioritize and implement the”*
- Deleted: *“Program”*
- Deleted: *“recruit, train”*

- Inserted: *“Continue to cultivate and enhance”*
- Inserted: *“which”*
- Inserted: *“to”*
- Inserted: *“attract, develop, engage”*

Item 3.1 new body text reads, *“Continue to cultivate and enhance Talent Management services, which help us to attract, develop, engage, and retain our employees.”*

Item 3.2 body text: Old text reads: *“Increase employee engagement and job satisfaction by assessing and enhancing culture, workplace environment, and employee recognition.”*

- Deleted: *“assessing and enhancing”*
- Deleted: *“workplace environment and employee recognition”*
- Inserted: *“continuing to assess and enhance”*
- Inserted: *“focusing on diversity and inclusion, valuing employees as individuals, and celebrating employee achievements.”*

Item 3.2 New body text reads, *“Increase employee engagement and job satisfaction by continuing to assess and enhance culture, focusing on diversity and inclusion, valuing employees as individuals, and celebrating employee achievements.”*

Slide 9: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 3 – Strong Organization (continued)”

Body text:

Item 3.3 body text: *“Support an environment where decisions are made at all levels by those who have both the expertise and best information.”* (no change)

- Inserted: *“3.4 Welcome, solicit, and value input and ideas from anyone in the organization.”*
- Inserted: *“3.5 Recruit and retain a high-performing workforce that leverages our state’s rich diversity and promotes inclusion.”*

Slide 10: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 4 – Operational Excellence” (no change)

Body text:

Old text reads: *“Optimize processes, products, services, and resources to better serve our customers.”*

- Inserted: *“internal and external”*

New body text reads: *“Optimize our processes, products, services, and resources to better serve our internal and external customers.”*

A photo is shown of a three women facing a laptop at a work table.

Slide 11: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 4 – Operational Excellence”

Body text:

Item 4.1 body text: *“Manage budgeted resources at the enterprise level and use performance metrics to meet short- and long-term business needs.”* (no change)

Item 4.2 body text: Old text reads, *“Use data modeling and analytics to enhance operations.”*

- Deleted: *“Use data modeling and analytics to enhance”*
- Inserted: *“Validate and utilize data, as authorized, to make decisions and improve business”*

Item 4.2 New body text reads, *“Validate and utilize data, as authorized, to make decisions and improve business operations.”*

Item 4.3 body text: Old text reads, *“Leverage and modernize IT systems and processes to support enterprise business activities, including financial, human resources, and nontax programs.”*

- Deleted: *“enterprise”*
- Deleted: *“including financial, human resources, and nontax programs.”*
- Inserted: *“and improve”*
- Inserted: *“and administrative”*

Item 4.3 New body text reads, *“Leverage and modernize IT systems and processes to support and improve business activities.”*

Slide 12: Strategic Plan 2021-2025 (Draft)

Subtitle:

“Goal 4 – Operational Excellence (continued)”

Body text:

Item 4.4 body text: Old text reads, *“Mitigate emerging and evolving threats and manage risks to maintain taxpayer privacy and security.”*

- Deleted: *“maintain”*

- Deleted: “*taxpayer*”
- Inserted: “*protect*”
- Inserted: “*customer*”

Item 4.4 New body text reads, “*Mitigate emerging and evolving threats to manage risks and protect customer privacy and security.*”

Item 4.5 body text: Old text reads, “*Standardize our hardware and software to optimize operations.*”

- Inserted: “*and modernize*”

Item 4.5 New body text reads, “*Standardize and modernize our hardware and software to optimize operations.*”

- Inserted: “*4.6 Strengthen physical security to ensure the protection of our employees and mission critical operations.*”

Slide 13: Strategic Plan 2021-2025 (Draft)

“Questions?”

Slide 14: Strategic Plan 2021-2025 (Draft)

“Public Comment”