

FTB 2026 – 2030 Strategic Plan PowerPoint

Franchise Tax Board Meeting

Monday, December 8, 2025

Slide 1: FTB 2026 – 2030 Strategic Plan

Presenter Name: Roger Lackey, Finance and Executive Services Division

December 8, 2025

Slide 2: Development Process

- Feedback sessions
 - Internal
 - External
- Workshops

Slide 3: Preview of Draft FTB 2026 – 2030 Strategic Plan Goals

- **Goal 1** – Exceptional Service
- **Goal 2** – Effective Compliance
- **Goal 3** – Strong Organization
- **Goal 4** – Operational Excellence

Slide 4: 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.

Slide 5: Goal 2: Effective Compliance

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

2.1 – Identify non-compliant 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.

Slide 6: 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.

Slide 7: 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.

Slide 8: Goal 4: Operational Excellence (Continued)

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

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.

Slide 9: Goal 4: Operational Excellence (Continued)

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

4.6 – Continue to strengthen physical security to protect our employees, assets, and mission critical operations.

4.7 – Continue to advance equity by working with taxpayers and under-served communities, using available data to ensure that everyone is aware of their filing and payment obligations, and the availability of free and reliable resources.

Slide 10: Questions?

Slide 11: Public Comment