



Strategic Plan

2021–2025

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

-  Protect the privacy and security of data entrusted to us.
-  Carry out our fiduciary responsibilities to taxpayers by managing their accounts with accuracy and financial integrity.
-  Operate with transparency 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, and accountability. We value staff 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 appreciates 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 tools 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

Strive to continuously enhance 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 on the use 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

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

- 3.1 Continue to cultivate and enhance Talent Management services, which help us to attract, develop, engage, and retain our employees.
- 3.2 Increase employee engagement and job satisfaction by continuing to assess and enhance culture, focusing on diversity, equity, and inclusion, valuing employees as individuals, and celebrating employee achievements.
- 3.3 Support an environment where decisions are made at all levels by those who have both the expertise and best information.
- 3.4 Welcome, solicit, and value input and ideas from anyone in the organization.
- 3.5 Recruit and retain a high-performing workforce that leverages our state's rich diversity and promotes inclusion and equity.

GOAL 4: OPERATIONAL EXCELLENCE

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

- 4.1 Manage budgeted resources at the enterprise level and use performance metrics to meet short and long-term business needs.
- 4.2 Validate and utilize data, as authorized, to make decisions and improve business operations.
- 4.3 Leverage and modernize IT systems and processes to support and improve business and administrative activities.
- 4.4 Mitigate emerging and evolving threats to manage risks and protect customer privacy and security.
- 4.5 Standardize and modernize our hardware and software to optimize operations.
- 4.6 Strengthen physical security to ensure the protection of our employees and mission critical operations.
- 4.7 Continue to advance equity by working with taxpayers and under-served communities, using the information at hand to ensure that everyone is aware of their filing and payment obligations, and confirming that they participate using free and reliable resources.