



# 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, ignite ideas and innovation, communicate clear expectations, and invite everyone to maximize their potential every day.
- › **Bring Our Best**  
By bringing our best we exemplify honesty, 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 customers and each other. We deliver excellent products and services that meet the needs of our customers.
- › **Contribute to a Caring Community**  
We encourage mutual respect, kindness, and teamwork. This creates a supportive 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.





# Strategic Plan

2021–2025

Supporting Our State. Building Our Future.

CONNECT WITH US

[ftb.ca.gov](http://ftb.ca.gov)

## 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 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 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.

## 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.