



State of California

Franchise Tax Board

Michelle Fallon

Communications Director

Mission & Vision

TAXPAYER CENTRIC SERVICE

EFFECTIVE ENFORCEMENT

STRONG ORGANIZATION

OPERATIONAL EXCELLENCE

PRIVACY &
SECURITY



FIDUCIARY
RESPONSIBILITY



TRANSPARENT



PRINCIPLES &
VALUES





FTB

FTB End of Year

ACCOMPLISHMENTS

2014

2014



Questions?

2014 Accomplishments Video Text

Strategic Goal #1 - Taxpayer Centric Services

Filing Season Statistics

- ✓ Processed pieces of correspondence 255,000
- ✓ Answered Phone Calls 1,100,000
- ✓ Live Chats 125,000
- ✓ Filed VITA Returns 700,000

✓ Returns Filed:	<u>Personal Income Tax</u>	<u>Business Entity</u>
• Paper	3,768,612	767,388
• E-File, CalFile & Ready Return	14,215,664	970,339
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	17,984,276	1,737,727
Total Returns	19,722,003	

✓ Payments Processed	<u>Personal Income Tax</u>	<u>Business Entity</u>
	\$33,625,134,947	\$10,969,066,069
Total Payments	\$44,594,201,016	

- ✓ CalFile gets even better!
 - Adds prior year returns!
 - 287,850 file in 2014!
 - Calfile continues streak!
 - 2.2 Million returns filed over its lifetime!
 - Reducing paper filing by 13%.
 - We're saving trees!
- ✓ New!: 541 Fiduciary e-filers
 - Nearly 40% choose to E-File!

Web Improvements

- ✓ New!: "Ask a Legal Expert" link was added to ftb.ca.gov
- ✓ EDR: Improved Service for Taxpayers
 - Internal Taxpayer Folder puts: Payments, Refunds, and Correspondence in one folder!
- ✓ Static Website + The Cloud = Faster Downloads
- ✓ Faster Downloads + Archive Site = Better Search Results = Happy Taxpayers!
- ✓ "Voice of the Customer" –
 - 1st Customer Satisfaction Survey Conducted
 - Measures service levels to taxpayers

Strategic Goal #2 - Effective Enforcement

FTB Teams Up

Criminal Investigations Bureau + Multi Agency Task Force +
Fed/State = shares data

EDR (Enterprise Data to Revenue)

\$1 Billion + 10 months early + Release 2.1 =
Better Models & Predictors, Case Prioritization and Increased Revenue!

Strategic Goal #3 - Strong Organization

L.E.A.R.N - Leaning Experience And Resource Network

New System Offers:

- ✓ Enhancements
- ✓ Learning and performance
- ✓ Workforce planning and
- ✓ Staff development

Training Surveys

Lead to enhanced skills training...
for NEW Compliance Representatives Series and Tax Auditor Series

Strategic Goal #4 - Operational Excellence

Backlog Protest Desk - Legal Closes 49% of oldest Protest cases

Foundational Principles

- ✓ NEW: Video streaming FTB Board Meetings Improves Transparency –
SMILE! You're on camera!
- ✓ Mission and Values Team kicks around new values.

What others are saying about FTB

2014 Public Sector Partners Project Leadership Award for EDR

FTB Contributes to Community!

As a department we are committed not only to our jobs but to taking steps to better our communities. Since rolling out our strategic plan, you (FTB employees) have donated over:

- \$518,000 in charitable funds
- 2,300 rolls of bathroom tissue
- 110,000 pounds of food
- 1,800 pints of blood
- 2,000 pieces of schools supplies
- 2,500 stuffed toys.

All to benefit community drives and meet local needs.

Each of you make working at FTB the most fulfilling opportunity a leader can have. This comes from my heart to you....Thanks a Billion! - Selvi Stanislaus