

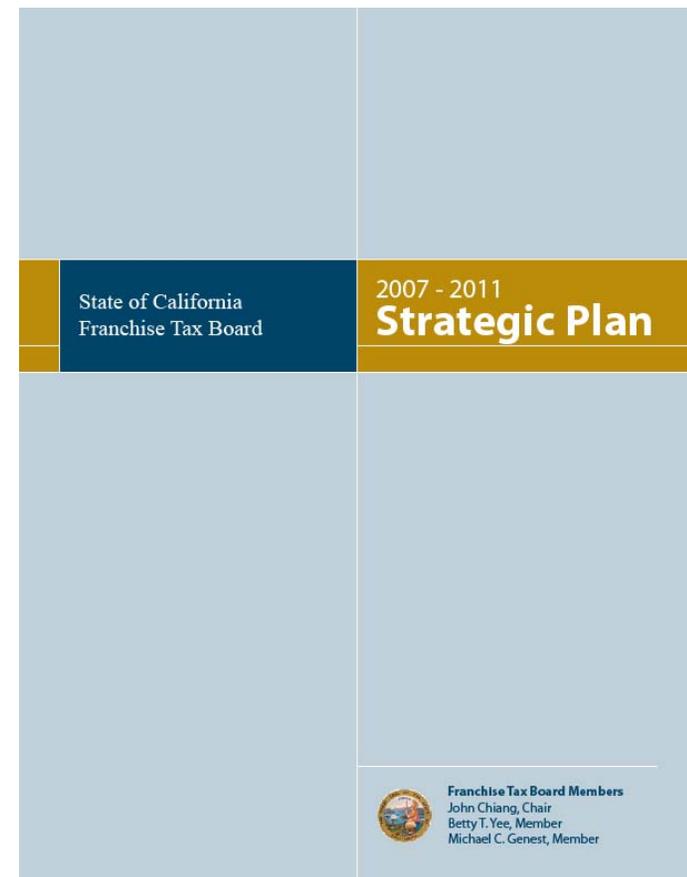
Tax Systems Modernization



Presentation for FTB Board Meeting
June 27, 2007

Strategic Plan

- January 2007 we updated our Strategic Plan
- **FTB Business Direction** for 2007-2011
- 6 Goals
 - Improve Customer Service
 - Increase Fairness and Compliance with Tax Law
 - Increase Transparency
 - Create a Great Place to Work, Contribute, and Learn
 - Demonstrate Operational Excellence
 - Protect Taxpayer Information and Privacy



Strategic Plan – Next Steps

- The next step is to develop a detailed **Technology** Strategic Plan
- This plan will answer the question of what technology do we need to meet the new vision in the Business Strategic Plan
- This plan supports and is an extension of the Strategic **Business** Plan.

- In mid 90s, we preformed a similar effort. This resulted in IT Project contracts of about \$100 million and generated about \$1 billion in benefits.

Technology Strategic Plan

- Lay out a road map for future technology investments by:
 - Documenting our current way of doing business and the problems that constrain Business improvement
 - Documenting the future way of doing Business based upon the **Business** Strategic Plan
 - Evaluating the latest technology to determine the smartest possible way to solve our business problems
 - Validating the IT infrastructure that we need to enable the Business
 - Identifying and prioritizing the Technology Projects needed to implement the Business Strategic Plan including
 - Business benefits and revenue
 - Risks
 - Time lines

Technology Strategic Plan – Next Steps

- Here are some of the critical dates:
- Kick Off IT Strategic Planning Effort July 2007
- Complete Business Opportunities Analysis November 2007
- Complete Implementation Plan February 2008
- Complete of IT Strategic Plan March 2008
- This will be a team effort. It will involve the highest levels of FTB executive leadership including business and technology, subject matter experts, our sister agencies, customers, and a Consultant, Performance Technology Partners.

Tax Systems Modernization Project

- “Pick FTB’s biggest problems. Solve them.”
- We want to make certain our future IT investments are smart; that is that they make a difference, provide the greatest business yield and that we can manage any of the risks and impacts that these investments may pose.

Thank you....



State of California

Franchise Tax Board