

F T B

State of California

2012 - 2016 STRATEGIC PLAN



Why is planning important to FTB?

- Our unique role in State Government.
- Our plans translate to real operable actions.
- Enterprise level planning guides operational planning in business areas

Planning Process

- October 2010 – Assignment Begins
- February 2011 – Study Other Plans
- May 2011 – First Draft
- July 2011 – Stakeholder Input
- October 2011 – FTB Members Review

Our Mission Statements

1982 – It is the mission of the Franchise Tax Board to fairly, effectively and efficiently administer those programs and functions delegated to the department by the Administration and **mandated by law**, including **self-assessed income tax programs**, programs to distribute benefits to the public and functions that contribute to the state’s operational effectiveness.

1983 – The principal mission of the Franchise Tax Board is to **collect revenues** for the State of California by effectively, efficiently, and equitably **administering those tax programs and functions** delegated to the department by the administration and/or **mandated by law**. The department also contributes to the state’s operational effectiveness through the administration of other nontax programs and functions

1989 – We do the jobs needed to make the State Income Tax System work!

2001 – The purpose of the Franchise Tax Board is to **collect the proper amount of tax revenue**, and operate other programs entrusted to us at the least cost; serve the public by continually improving the quality of our products and services, and perform in a manner warranting the highest degree of public confidence in our integrity, efficiency and fairness

Current Mission Statement

The purpose of the Franchise Tax Board is to collect the proper amount of tax revenue, and operate other programs entrusted to us, at the least cost; serve the public by continually improving the quality of our products and services; and perform in a manner warranting the highest degree of public confidence in our integrity, efficiency and fairness.

Proposed 2012 - 2016 Mission Statement

We provide the services and information to help taxpayers file accurate and timely tax returns and pay the proper amount owed. To accomplish this, we develop knowledgeable and engaged employees, administer and enforce the law with fairness and integrity, and responsibly manage the resources allocated to us.

MISSION

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STRATEGIC GOALS

Taxpayer Centric Service

Effective Enforcement

Strong Organization

Operational Excellence

We will enhance services that FTB provides to help taxpayers fulfill their tax obligations.

We will administer and enforce the law effectively to ensure that taxpayers meet their obligations to file and pay the proper amount owed.

We will invest in a strong organizational culture that develops employees as leaders, challenges and empowers them in their jobs, and helps them achieve their fullest potential.

We will build an operational infrastructure in order to continuously provide excellent and cost effective products and services to our customers.

FOUNDATIONAL PRINCIPLES

This Strategic Plan affirms a set of principles that provide an important part of the foundation on which FTB conducts its business. These principles support the FTB Mission and will guide the work we do to achieve the Goals and implement the Strategies in this Plan.

Protect taxpayer information and privacy.

Carry out our fiduciary responsibilities for 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 Principles of Tax Administration and FTB's organizational values.

What's Different?

- Taxpayer-Centric
- Focused on Outcomes
- Importance of Employees
- Fiscal Responsibility