



CDTFA
CALIFORNIA DEPARTMENT OF
TAX AND FEE ADMINISTRATION



Strategic Plan

2023-2025

MISSION

We make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.

CORE PRINCIPLES

Being **SMART** about how we achieve our mission.
SERVING taxpayers so that they can comply with their responsibilities.
SUPPORTING one another as we work together to meet our goals.

SMART

- We are building the nation's most effective revenue department. By streamlining our processes and harnessing new technologies, we will do our jobs more effectively and adapt to meet the challenges of the modern marketplace.
- We stress innovative problem solving in everything we do. While recognizing that the old way may still be best, we never stop looking for a better way.

SERVICE-ORIENTED

- We know that taxes can be complicated, and we are here to help. Recognizing that our taxpayers represent the full diversity of California and include businesses small and large, we are committed to serving them equitably and making our programs accessible for all.
- We recognize that fulfilling our responsibilities to the public requires quality service, communication, and respect. Our experience shows that when we serve our taxpayers well, our success follows.

SUPPORT OUR TEAM

- We are only as strong as our people. To attract and retain the best workforce, we recognize excellence, support our colleagues, act ethically, and provide team members the professional development necessary to succeed and grow.
- Integrity and honesty are the heart of our organization. We aim to maintain high ethical standards in everything we do.

STRATEGIC PLAN GOALS

GOAL 1

Modernize Tax Administration

- A. Streamline tax collection to increase revenue and improve efficiency.
- B. Adapt to meet the challenges of a changing economy, including online sales, cannabis legalization, and point-of-sale technologies.
- C. Create a culture of continuous process improvement.
- D. Harness state-of-the-art technologies to improve accuracy and boost efficiency.



GOAL 2

Improve the Taxpayer Experience

- A. Expand services for taxpayers.
- B. Increase outreach, communication, and education efforts.
- C. Minimize taxpayer burden and increase compliance.



GOAL 3

Support Our Team

- A. Improve recruitment, selection, and promotional opportunities to build a highly skilled team.
- B. Create a workplace culture where all team members feel valued, and are able to contribute their full talents.
- C. Foster a culture of career growth and develop CDTFA team members by providing helpful resources, high-impact training, valued mentoring, and knowledge transfer - all essential to succession planning.
- D. Promote and sustain an ethical workplace culture.



ABOUT CDTFA



The California Department of Tax and Fee Administration (CDTFA) administers California's sales and use, fuel, tobacco, alcohol, and cannabis taxes, as well as a variety of other taxes and fees that fund specific state programs. CDTFA administered programs collect over \$94 billion annually which in turn supports local essential services such as transportation, public safety and health, libraries, schools, social services, and natural resource management programs through the distribution of tax dollars going directly to local communities.

Tax programs administered by CDTFA are concentrated in two general areas—sales and use, and special taxes and fees.

To best serve our customers, CDTFA has offices throughout the state along with offices located in New York, Chicago, and Houston. While the CDTFA team is spread out geographically, we are united in working together to serve taxpayers.