



The Franchise Tax Board’s mission is to help taxpayers file timely and accurate income tax returns and pay the correct amount to fund services important to Californians. FTB has more than 6,200 employees operating within seven distinct business areas: Administrative Services, Financial and Executive Services, Technology Services, Audit, Legal, Accounts Receivable Management, and Filing. Together, as One FTB, we administer California’s income tax programs which contribute over 70 percent of the General Fund, which funds multiple services important to Californians.

FTB’s culture is founded on organizational values that enhance performance:

- Lead with Integrity and Inspiration
- Bring Our Best
- Deliver Excellent Products and Services
- Contribute to a Caring Community
- Become Experts at What We Do

Its strategic goals are built around providing taxpayer-centric service, assuring effective compliance, creating a strong organization and fostering a culture of operational excellence.

FTB’s EDR Project: Harnessing Data to Improve Performance

FTB saw that consolidating its various data warehouses into a single, enterprise data warehouse and applying analytics was the critical first step to harnessing that data to generate more revenue for the state. The Enterprise Data to Revenue (EDR) Project is Phase 1 of a three-phase, 30-year strategy to modernize FTB tax systems. Below are the six problems/opportunities FTB has identified and how FTB will solve the problems over the three phases.

Business Problems/Opportunities	EDR 1 <i>complete</i>	EDR 2	EDR 3
Data Availability	50%	90%	100%
Business Processes	30%	90%	100%
Redundancy & Reuse	30%	70%	100%
Self- Services	30%	90%	100%
Data Analytics	20%	90%	100%
Aging Legacy Systems and Outdated Technology	10%	70%	100%
TOTAL	33%	78%	100%

Through modernizing and consolidating its data resources and using rigorous analysis to identify areas where performance could be improved, FTB has been able to assist more taxpayers and other stakeholders and provide a better customer experience.

The results include generating an additional \$1 billion a year in compliance revenue on an ongoing basis, increasing customer use of the MyFTB web portal to allow customers to manage their tax information online and increasing the amount of revenue collected through automated filings by \$700 million.