



CDTFA
CALIFORNIA DEPARTMENT OF
TAX AND FEE ADMINISTRATION

Strategic Plan

2026–2028



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 strive to be the nation's most effective revenue department. By improving efficiencies, streamlining our processes, and harnessing new technologies, we continue to 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 the expertise and wisdom upon which our processes are based, 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 us to provide quality service, clear and timely communication, and respect. When we serve 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 with the professional development necessary to succeed and grow.
- Integrity and honesty are the heart of our organization. We aim to uphold the highest ethical standards in all we do.

STRATEGIC PLAN GOALS

GOAL 1

Modernize Tax Administration

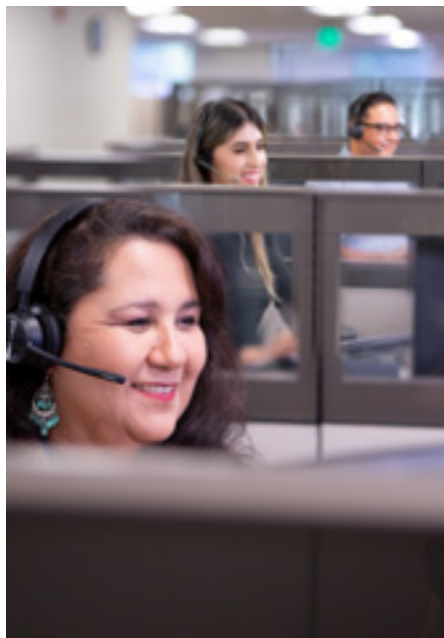
- A. Streamline tax collection to increase revenue and improve efficiency.
- B. Adapt to a changing economy by strengthening tax compliance, accountability, and enforcement through improved oversight of emerging marketplaces, technologies, and business practices.
- C. Create a culture of continuous process improvement.
- D. Harness state-of-the-art technologies to improve accuracy and boost efficiency.



GOAL 2

Improve the Taxpayer Experience

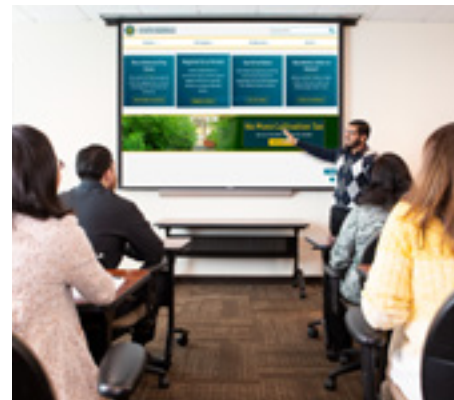
- A. Expand services for taxpayers.
- B. Increase outreach, communication, and education efforts.
- C. Minimize the taxpayer burden and increase compliance.



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.



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. Each year, CDTFA-administered programs generate nearly \$100 billion that supports essential services such as transportation, public health and safety, libraries, schools, social services, and natural resource management programs through the distribution of tax dollars that go 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 geographically dispersed, we are united in working together to provide taxpayers with exceptional service.

www.cdtfa.ca.gov

THANK YOU FOR
CONNECTING WITH US

