



IDAHO
State Tax Commission

STRATEGIC
PLAN
2015 - 2019

MESSAGE FROM THE COMMISSIONERS

Evolving. That one word sums up our approach to our FY 2015-2019 strategic plan and our future. Definitions of “evolve” include change, grow, progress, advance, develop, and go forward. That’s exactly what we’re doing—improving on an existing foundation of solid tax administration by being more nimble, adapting more quickly to changes in the world of taxes, and using data analytics to help us make better, more informed decisions.

We’ve made some changes in our agency vision, mission, and strategic plan to align with plans for this evolution. The biggest change is the addition of a fourth goal to our strategic plan. It reads: “Expand and enhance how the agency thinks about, maintains, and uses data to inform internal and external decision making.”


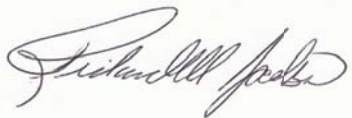
We have taken to heart the 2013 recommendations of Idaho’s Office of Performance Evaluations and criticisms from our stakeholders, and hired a data analyst to help guide us toward achieving the new goal set forth in our strategic plan. This analyst is an agency resource who can help us all begin developing a new mindset and seeing new opportunities that await us in using research methodology to provide the best possible outcomes in the way we do business.

Besides our new goal, we continue to support our previous strategic goals of administering tax law fairly, focusing on employee development, and constantly looking for more efficient ways to do business. We’ll be looking for new ways to approach each of these goals within our new data-driven mindset.

We also continue to explore new ways to engage employees, making sure that they feel what we know—that their contributions matter and are valued. And we maintain our efforts to improve opportunities for public outreach, to ultimately boost confidence in our agency and its mission.

The strategic plan forms the basis for the business plans developed in each division and program. These business plans are the working documents for our agency, governing the projects and tasks our employees carry out to accomplish the goals set forth in the strategic plan. When all is said and done, our overall goal is to evolve to a place where we can say matter-of-factly that we’re “the best darned tax agency in the nation!”.

— Chairman Richard Jackson, Commissioner Tom Katsilometes, Commissioner David Langhorst, Commissioner Ken Roberts



OUR VISION

The Tax Commission will inspire public confidence through innovative service delivery, courteous professional conduct, effective education, and fairness in tax administration

OUR MISSION

To administer the state's tax laws in a fair, timely, and cost-effective manner to benefit all Idaho citizens.



Our values: Accomplishment, Credibility, Dependability, Enjoyment, Fairness, Integrity, Quality, Respect, Teamwork.

GOAL 1: ADMINISTER TAX LAW AND DEVELOP RULES AND POLICIES THAT PROMOTE FAIRNESS, CONSISTENCY, COMPLIANCE, SECURITY, AND PUBLIC CONFIDENCE.

(IA) Move the existing legacy Property Tax administration system to a client-server, Web-based PC format.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
A Web-based property tax administration system will be operational in at least one county by the end of December 2015.	Property Tax	Dec. 2015

(IB) Determine customer feedback needs, review current agency surveys, and design and implement customer improvement ideas.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Design and implement customer feedback mechanisms that tie to our organizational objectives.	Communications, Research, Organizational Development	June 2015
Assess customer feedback, prioritize, and implement improvement recommendations.	Communications, Research, Organizational Development	June 2015
Provide a business case for tracking customer complaints and recommend a solution.	Communications, Research, Organizational Development	Tracking customer complaints by Sept. 30, 2014

(IC) Increase public involvement in the rule-making process.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Increase public participation in the rule-making process by providing additional training on rules administration.	Policy	Dec. 2014
Analyze communication channels to determine best medium for posting all rule-making agendas, and begin sending agendas through the appropriate medium.	Communications, Policy	Dec. 2014

(ID) Create an internal process to capture internal systemic tax issues that don't align with statute due to technology or current business practices.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Conduct a gap analysis of current processes and desired outcomes to identify the most efficient and strategic solution.	Policy partnership with Legal, Audit, Research and the Legislative Services Office	June 2015

GOAL 2: PROMOTE AND MODEL BEHAVIORS THAT RESULT IN A HIGH-QUALITY WORK FORCE OF EMPLOYEES WHO TAKE PRIDE IN THEIR WORK AND THE AGENCY.

(2A) Provide training and development programs and tools to increase awareness of Tax Commission policies, practices, and employee development.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Deliver required agency core competency training monthly to all employees with 100% participation.	Human Resources	FY 2015-2019
Provide new supervisors with orientation within 90 days of their appointment.	Human Resources	FY 2015-2019
Security awareness training is completed annually.	Security	FY 2015-2019

(2B) Implement Employee Opinion Survey to assess the agency’s culture, leadership, job satisfaction, and training.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Employee Opinion Survey is implemented, results are reviewed, and areas of improvement are identified.	Human Resources, Research	FY 2015

(2C) Continue to develop and implement recruitment strategies to fill high-priority, hard to fill positions and/or those with high turnover / low retention with highly qualified individuals.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Collect and analyze recruitment, retention, and turnover data to identify and address challenges and trends.	Human Resources, Research	FY 2015-2019

GOAL 3: SEEK AND IMPLEMENT EFFICIENT OPERATIONS WITHIN THE AGENCY TO SUPPORT OUR MISSION.

(3A) Promote e-filings to modernize and improve current audit and revenue processes.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Increase individual income tax return e-filings to 90% of the individual filing population.	Revenue Operations	June 2019
Increase business income tax return e-filings to 80% of the business filing population.	Revenue Operations	June 2019

(3B) Enhance agency public presentations, information, and education to help improve our agency public relations.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Train staff in testifying before a committee.	Policy	Dec. 2014
Develop and maintain presentation for staff and commissioners to use for public or group presentations.	Communications	June 2015
Create and display taxpayer rights information in Boise and all field offices.	Communications	June 2015

(3C) GenTax V9 software upgrade is complete and functional.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Phase I conversion completed with identified process improvements.	Information Technology	Sept. 2014
Phase II enhancements completed and operational.	GenTax Project Team	Jan. 2015
Roll out new Taxpayer Access Portal.	GenTax Project Team	Jan. 2015

Goal 3 continued on next page.

GOAL 3 (CONTINUED): SEEK AND IMPLEMENT EFFICIENT OPERATIONS WITHIN THE AGENCY TO SUPPORT OUR MISSION.

(3D) Identify the most common taxpayer inquiries.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Determine the 5-10 most common issues via Taxpayer Services Call Log and website feedback, and decrease their magnitude.	Collection, Communications, Research	June 2015
Develop and implement effective communication or education methods to address issues.	Collection, Communications, Research	June 2015

(3E) Replace and maintain critical equipment and software as it becomes unable to meet minimum performance standards.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Upgrade Navision financial and HR software to maintain operating system support.	Management Services, Information Technology, Human Resources	FY 2015-2019
Replace imaging hardware.	Revenue Operations	FY 2015-2019

GOAL 4: EXPAND AND ENHANCE HOW THE AGENCY THINKS ABOUT, MAINTAINS, AND USES DATA TO INFORM INTERNAL AND EXTERNAL DECISION MAKING.

(4A) Create and provide performance dashboards with leading and lagging key performance indicators to improve data-informed decision making.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Create performance metrics dashboards with leading and lagging indicators.	Executive Leadership Team, Research	June 2015
Create a centralized location for performance information to be readily accessed.	Executive Leadership Team, Research	June 2015
Performance metrics are reviewed monthly in ELT Meeting	Executive Leadership Team, Research	Dec. 2015

(4B) Institute a Data Governance Workgroup that establishes a system of data-related standards, processes, and expectations across the agency.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
A Data Governance Workgroup is established and operational.	Data Governance Workgroup	July 2014
A data governance charter is created by the Data Governance Workgroup.	Data Governance Workgroup	Sept. 2014

(4C) Develop and implement Collection and Audit case selection prioritization models to make the best use of resources.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
Prioritization models area created for case work allocation.	Audit, Collection with Legal, Research	June 2015
The prioritization models are implemented.	Audit, Collection with Legal, Research	June 2015

(4D) Institute an Agency Research Agenda to support data-informed decision making for commissioners, staff, and external stakeholders.

<i>Measure</i>	<i>Owner</i>	<i>Timeline</i>
A research agenda is created for the agency that meets the approval of the Commissioners.	Research	Aug. 2014
The research agenda is reviewed and updated annual in partnership with the Strategic Plan and Business Plans	Research	Aug. 2014

KEY EXTERNAL FACTORS

Population and workforce changes

Budget appropriation levels

Idaho's changing economy

Pace and cost of technology

Increasing complexity and changes in the global economy

Court decisions, legislation, and federal budget and mandates