



NAVIGATING CHANGE

Strategic Plan 2020 - 2024

MESSAGE FROM THE COMMISSIONERS

As it has repeatedly throughout its history, the Idaho State Tax Commission overcame historic challenges to enter fiscal year 2020 better positioned and more committed than ever to fulfilling our vision, values and mission. The skilled, hard-working people of the Tax Commission are proud of their contributions to our state government and dedicated to providing unmatched customer service to every Idaho taxpayer.

Our plans for the coming year feature improving internal processes to capture more efficiencies, as well as increasing our use of state-of-the-art GenTax® technology to keep up with Idaho's red-hot population and economic growth. At the same time, we'll continue enhancing taxpayers' experience with outreach and education aimed at encouraging voluntary compliance with Idaho's tax laws and earning public confidence.

We also will continue upgrading our Taxpayer Access Point (TAP) system to make it easier for customers to securely conduct more types of tax transactions online. And we'll get a better idea of how we're doing as an agency through annual stakeholder surveys to help identify areas where we can improve.

FY2020 also finally brings the long-awaited move of the Tax Commission's Boise office from the Park Boulevard Plaza near downtown to the former Hewlett-Packard campus along Chinden Boulevard on Boise's west side. Over 450 Tax Commission personnel will be among the first state employees based in the newly renovated complex that we'll call home for years to come.

The Tax Commission's goals for the coming year and beyond focus on empowering great public servants to keep improving what they do, demonstrating strong financial stewardship over the public's money, and promoting the kind of efficiency in administration of Idaho tax laws that inspires stakeholder support.



Chairman Tom Harris, Commissioner Tom Katsilometes, Commissioner Elliot Werk, Commissioner Janet Moyle

OUR VISION

Great people. Helping you. Serving Idaho.

OUR MISSION

Voluntary tax compliance through innovative customer service, courteous professional conduct, effective education, and fair administration.

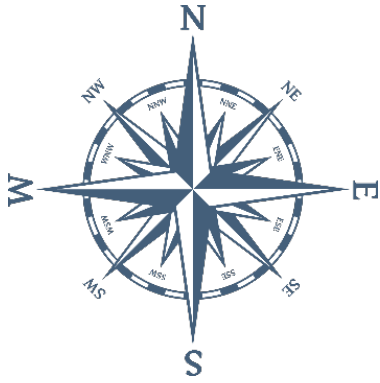
OUR VALUES

Fairness

Accountability

Integrity

Respect



Goal I:

Demonstrate Financial Stewardship

OBJECTIVES:

IA Reduce costs and increase efficiency

Goal I: Demonstrate Financial Stewardship

Objective IA – Reduce costs and increase efficiency

Task and Performance Measure(s)

By

Benchmarks

Increase the number of tax types or significant processes in GenTax

Integration Services

- Add one tax type or process into GenTax annually¹

Measure cost to collect \$1 of revenue

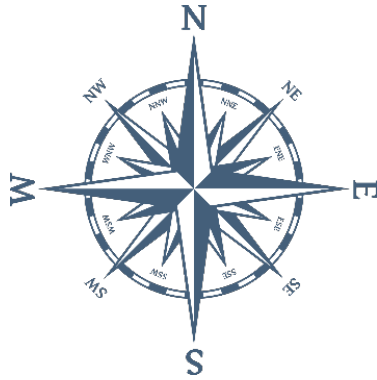
Management Services

- Reduce cost by 1% annually²

Explanations:

¹Based on Management's best estimate of resources

²Based on prior years' experience



Goal 2:

Drive Stakeholder Support

OBJECTIVES:

2A Assess stakeholder perspectives

Goal 2: Drive Stakeholder Support

Objective 2A - Assess stakeholder perspectives

Task and Performance Measure(s)

By

Benchmarks

Develop and implement stakeholder surveys

TRU

Annually by Tax Year 2020¹

Explanations:

¹*Based on the annual tax year cycle*

Goal 3:

Promote Efficiency

OBJECTIVES:

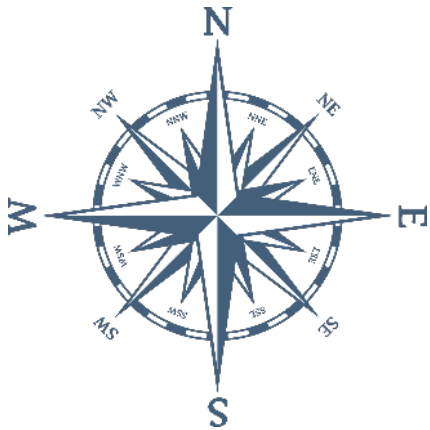
3A Revise Business Case Analysis initiation and project prioritization process

3B Streamline GenTax service pack user acceptance testing

3C Align GenTax and Taxpayer Access Point (*online taxpayer access*)

3D Improve overall efficiency

3E Streamline PAR process by eliminating paper



Goal 3: Promote Efficiency

Objective 3A - Revise Business Case Analysis (BCA) initiation and project prioritization process.

| <i>Task and Performance Measure(s)</i> | <i>By</i> | <i>Benchmarks</i> |
|--|----------------------|--|
| Complete BCAs within one month | Integration Services | One month within eight months ¹ |

Explanations:

¹Dependent on available resources

Objective 3B - Streamline GenTax service pack user acceptance testing.

| <i>Task and Performance Measure(s)</i> | <i>By</i> | <i>Benchmarks</i> |
|---|----------------------|---|
| The number of required test scenarios. | Integration Services | 2,500 or less, within eight months ¹ |

Explanations:

¹Based on management best estimates and history

Objective 3C - Align GenTax and TAP

| <i>Task and Performance Measure(s)</i> | <i>By</i> | <i>Benchmarks</i> |
|--|----------------------|---|
| Add tax types to GenTax & TAP to eliminate manual and redundant process | Integration Services | An additional three types in six months ¹ |
| Aligning tax types in TAP that exist in GenTax | Integration Services | An additional three types in nine months ¹ |

Explanations:

¹Based on available resources

Objective 3D - Improve Overall Efficiency

Task and Performance Measure(s)

By

Benchmarks

The number of transactions per Revenue Operations employee due to technology and process improvements

R.O.

31,790¹

Explanations:

¹Based on established FY2019 target

Objective 3E - Streamline PAR process by eliminating paper

Task and Performance Measure(s)

By

Benchmarks

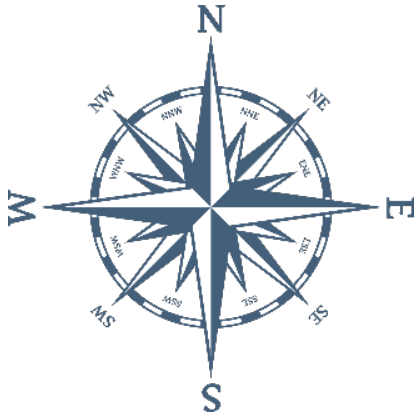
The amount of time it requires to manage the PAR process; initiate, approve, manage, and complete

Integration Services

Implemented paperless process by end of CY2020¹

Explanations:

¹Based on prior automation experience and available resources



Goal 4:

Empower Great People

OBJECTIVES:

- 4A Implement a “voice of the employee” survey
- 4B Implement a training program for supervisors

Goal 4: Empower Great People

Objective 4A - Implement a “voice of the employee” survey

Task and Performance Measure(s)

By

Benchmarks

Implement a “voice of the employee” survey

HR

90% response rate within two years¹

Explanations:

¹*Based on industry standards*

Objective 4B - Implement a training program for supervisors

Task and Performance Measure(s)

By

Benchmarks

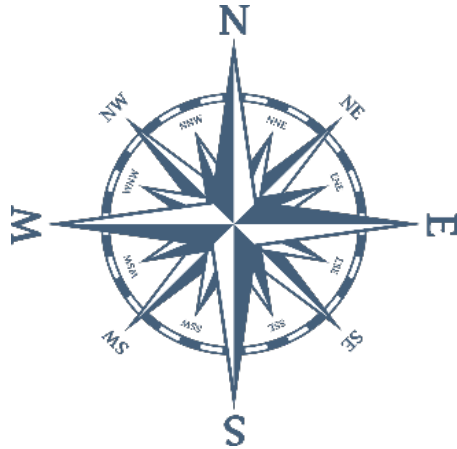
Trained supervisors

HR

90% within two years¹

Explanations:

¹*Based on industry standards*



Goal 5:

Secure Confidential Information

OBJECTIVES:

- 5A Improve use of GenTax security and control features
- 5B Improve security awareness
- 5C Improve security over taxpayer information

Goal 5: Secure Confidential Information

Objective 5A - Improve use of GenTax security and control features

Task and Performance Measure(s)

By

Benchmarks

Implementation of controls

Security

Add four within one year¹

Explanations:

¹Based on management expectations

Objective 5B - Improve security awareness

Task and Performance Measure(s)

By

Benchmarks

Job specific security training

Security

Two new within one year¹

Explanations:

¹Based on management expectations and industry best practices

Objective 5C - Improve security over taxpayer information by moving processing out of Access databases

Task and Performance Measure(s)

By

Benchmarks

Number of tax types and processes managed in Access

Security

Reduce by three per year¹

Explanations:

¹Based on security best practices

EXTERNAL FACTORS

POPULATION GROWTH

Maintaining current department service levels with existing resources will continue to be a challenge as we experience high population growth in select areas of the state. Idaho is becoming a destination location for retirees. Continued growth in the Canyon County area will likely result in the need to open an additional field office within the next 5 years.

WORKFORCE TRANSITIONS

Our workforce is aging, increasing the number of potential retirees and posing a continual challenge in transition planning and knowledge transfer. Younger workers typically have shorter lengths of employment, affecting staff turnover.

ELECTRONIC SERVICES AND EXPANDED USE OF MOBILE DEVICES

The need to automate manual processes will continue to increase. Customers will want improved access to technology to meet their expectations of anytime, anywhere, any device. In addition, taxpayers expect to interact with us using current technology that is easy and intuitive.

COMPETITION FOR EMPLOYEES WITH ESSENTIAL SKILLS

As the economy improves and our salary ranges for critical skills fall further behind market rates, we are experiencing difficulties in attracting and retaining qualified people.

COMMUNICATION AND EDUCATION WITH CHANGING TECHNOLOGY

Technological advancements in our tax processing system will require ongoing education and communication to staff and taxpayers.

IMPENDING TAX COMMISSION MOVE

The relocation of our Boise office will have an impact on the agency.

Addendum to Agency Strategic Plans: Adoption of the NIST Cybersecurity Framework and Implementation of CIS Critical Security Controls 1 – 5.

As a technology customer of the Office of Information Technology Services (ITS) in the Governor's Office, we are using the cybersecurity systems and technical expertise in ITS to fulfill requirements related to Executive Order 2017-02. Staff from ITS briefed the NIST Core Framework, CIS Controls 1-5, and their plan for adoption of the NIST Cybersecurity Framework. We participate in DHR and ITS administered cybersecurity training, as awareness is a critical component of an effective cybersecurity program. As briefed by ITS staff, implementation of the CIS Controls 1-5 will be their responsibility for the systems they operate and, as technological tools applied to the computer systems, largely invisible to us as a customer. ITS, working through the multi-agency Incident Response Task Force, has developed an Incident Response Program in support of our agency.

Red Tape Reduction Act Compliance

The Idaho State Commission has an active rules review process and strives to maintain only essential and effective rules. The agency has designated a Rules Review Officer to oversee this effort on a continuous basis. Results so far are:

Number of rules cut: 37 plus 2 rules with subsections removed.

Number of pages cut: 14

Word reduction count: 6,908

Two entire chapters eliminated.