

IDAHO

State Tax Commission

Strategic Plan 2024 – 2028

Message from the Commissioners:

The Idaho State Tax Commission, while reporting on the previous years' accomplishments, remains forward focused on a strategic approach to serving Idaho taxpayers. We continued to retain, develop, and recruit good people. We focused our resources on improving our customer interactions. We implemented strategies to deliver better service to our employees and our customers.

We achieved two key successes with the help of Governor Little and the Legislature. First, the Governor proposed, and the Legislature approved an enhancement to our GenTax software known as Fast Collection Services (FCS), which is going live November 6, 2023. FCS looks at collection accounts and uses data to determine how much contact is needed to allow a taxpayer to take care of paying their own taxes. It uses an automated approach to contact customers who owe taxes and provide them with options for resolving their balances. No human interaction is necessary through this self- cure process.

Second, we're currently putting an imaging system out for bid. New imaging technology converts taxpayers' documents into digital images faster with improved data accuracy. A faster and more accurate system will reduce backlogs caused by outdated and labor-intensive systems in use today.

Both FCS and a new imaging system will help us serve Idaho taxpayers better.



*Chairman
Jeff McCray*



*Commissioner
Tom Katsilometes*



*Commissioner
Janet Moyle*



*Commissioner
Jared Zwiygart*

OUR VISION

Great People. Helping you. Serving Idaho.

OUR MISSION

Benefit Idaho through courteous customer service, education, and fair tax administration.

OUR VALUES

Fairness

Accountability

Integrity

Respect

Agency Overview, Divisions, and Core Functions

The Idaho State Tax Commission consists of five primary divisions, each of which contribute to the overall success of the agency. Over the last four years, all divisions have banded together to create the ensuing Strategic Plan that grows with our needs and processes.

The General Services Division consists of Commissioners, Legal, Tax Appeals, Human Resources, Management Services (Accounting, Procurement, Project Management, GenTax Development/Support), and Taxpayer Resources (consisting of Communications, Tax Research, and Taxpayer Services). They provide for centralized management, internal policy development, taxpayer appeals, legal, personnel, fiscal, communication, and taxpayer outreach services.

☞ Associated with Goals 1, 2, and 3

The Audit Division operates from the administrative office in Boise and in five field office locations (Lewiston, Coeur d’Alene, Twin Falls, Idaho Falls, and Pocatello). The division conducts audits on all tax types administered by the agency by authority of Idaho Code and the Multistate Tax Compact. They conduct discovery and enforcement efforts directed at nonfilers and oversee efforts to minimize identity theft and fraud issues.

☞ Associated with Goals 1, 2, and 3

The Compliance Division operates from the administrative office in Boise, and both works from and oversees the five field office locations. The division is responsible for collecting delinquent taxes for all tax types. The division is also responsible for voluntary compliance and education of the Temporary Seller’s Permit program. The employees also provide front-line taxpayer services at the counters and over the phone in the five field offices.

☞ Associated with Goals 1, 2, and 3

The Revenue Operations Division maintains the taxpayer database, processes all tax returns and payments, initiates the deposit of money received, and issues taxpayer refunds. The division registers permit holders for 17 tax types including sales, withholding, hotel/motel, motor fuels, beer, wine, cigarette and tobacco taxes; ensures that all individuals and licensed businesses have access to proper tax forms for reporting; processes revenue and refund documents submitted by taxpayers; and maintains an imaging system used to streamline the processing and storing of tax documents. In the last fiscal year, the Tax Commission processed almost \$7.4 billion in receipts; most through this division.

☞ Associated with Goals 1, 2, and 3

The Property Tax Division provides oversight in the administration of the property tax system. The division is responsible for annually appraising all class three operating property, examining property tax levies of all taxing districts, training and assisting county elected officials, developing an assessor’s manual to facilitate uniformity of appraisals, and administering the Property Tax Reduction (Circuit Breaker) program. Property taxes generated \$2,177.1 billion of revenue to local government units in calendar year 2022.

☞ Associated with Goals 1, 2, and 3

The goals and objectives of the agency are reflected on the following pages.

❖ Goal 1: Be a Team of Great People

- ▶ Objective: Retain, develop, and recruit great people
 - Performance Measure: Conduct Survey to measure employee engagement (target 40%)¹

Performance Targets	By	Target
Employee engagement metric	Human Resources	40%
Retention and turnover measure	Human Resources	<=10%
Actual personnel dollars to total budget per pay period (average)	Management Services	\$10,000

❖ Goal 2: Effectively Serve our Customers

- ▶ Objective: Deliver professional customer service.
 - Performance Measure: TAP Survey response score (target 85%)²

Performance Targets	By	Target
TPS average call hold times	Taxpayer Resources	7:00 minutes ³
TPS call abandonment rate	Taxpayer Resources	16% ⁴
Percentage of IBRs processed within 7 days ⁵	Revenue Operations	95%

❖ Goal 3: Increase Agency Efficiency

- ▶ Objective: Continually improve processes using all available tools
 - Performance Measure: Increase agency efficiencies by implementing training programs for agency staff.

Performance Targets	By	Target
Supervisory classes completed	All Divisions	90% completion ⁶
Workforce development	All Divisions	80% completion ⁶
Storage solutions for documentation	All Divisions	20% completion ⁷

¹ The agency is targeting an increase to 40% of engaged employees in FY 24, as management has deemed it a challenging but realistic target.

² The 85% target is based on industry standards for web-based satisfaction surveys. The survey began in December 2020

³ Target increased from 2:00 minutes to 7:00 minutes, current industry standard. Calls are increasingly more complex.

⁴ Target increased from 8% to 16% based on current call volumes.

⁵ The percentage of Idaho Business Registrations (IBRs) processed within 7 days is for FY 23; 95% target is realistic and achievable.

⁶ Agency-wide training programs are being developed, per division. Goals are achievable by FYE.

⁷ Over the next five years, the agency will have implemented agency-wide storage and retention of all standard operating procedures.

External Factors:

WORKFORCE TRANSITIONS AND COMPETITIVE EMPLOYMENT MARKET

Our workforce continues to age, which poses a continual challenge in transition planning and knowledge transfer. We're hiring younger employees, but many are with the Tax Commission for shorter durations because the pay is too low. Salary ranges for critically skilled employees are still below market rates and other state agencies.

POPULATION GROWTH

The state of Idaho continues to be a destination for retirees and maintaining current department service levels with existing resources will continue to be a challenge. The population in Canyon County continues to increase making the potential need for an additional field office within the next four years still a concern. Currently, there are 6 Field Offices that require enhancements to accommodate the increased foot traffic and local phone calls.