

IDAHO

State Tax Commission

Great People. Helping you. Serving Idaho.

Strategic Plan 2025 – 2028

Message from the Commissioners:

At the Tax Commission, employees and leaders alike focus on customer service that puts the taxpayer first and continuous improvement to help us achieve our goals. This focus keeps us looking at how we work, and how we can work better to benefit Idaho. Every day.

In the coming year, we're concentrating our efforts on:

- Upgrading our GenTax system. This is the system we use to manage taxpayer accounts, process returns and payments, and issue refunds. Routine upgrades – like the one planned for 2025 – improve efficiency, security, and ease of use. This upgrade will also allow taxpayers with Taxpayer Access Point accounts to see their updated balance sooner, and they'll have more authentication options when logging on to their account.
- Upgrading our imaging system. The new imaging technology will convert taxpayers' documents into digital images faster with improved data accuracy, reducing backlogs caused by outdated and labor-intensive systems in use today.
- Exploring more self-help options with our Fast Collection Services (FCS). FCS lets taxpayers who owe money choose a payment plan without contact from us.

As commissioners, we're proud of the work this agency continues to do. We're also excited about continuously improving because it keeps our employees challenged and our work dynamic, and it serves Idaho taxpayers more efficiently. Every day.



*Chairman
Jeff McCray*



*Commissioner
Janet Moyle*



*Commissioner
Jared Zwygart*



*Commissioner
Paul Woods*

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, 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 (Revenue and Procurement) Technology and Information (GenTax Development/Support and Project Management), and Taxpayer Resources (consisting of Communications, Government Affairs, Tax Research, and Taxpayer Services). They provide 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 non-filers 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 \$7.5 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 \$2.162 billion of revenue to local government units in calendar year 2023.

∞ Associated with Goals 1, 2, and 3

❖ Goal 1: Be a Team of Great People

- ▶ Objective: Retain, recognize, develop, and recruit great people
 - Performance Measure: Conduct Survey to measure employee satisfaction target 3.75)¹

Performance Targets	By	Target
Promoter Score	All Divisions	3.75
Retention and turnover measure	Human Resources	<=10%
Unutilized personnel dollars 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

❖ 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
Implement Operational Excellence	All Divisions	90% completion ⁵
Unplanned GenTax work	All Divisions	<30% ⁶
Storage solutions for Standard Operating Procedures	All Divisions	20% completion ⁷

¹ The agency is creating a new survey to measure burnout, turnover, and overall job satisfaction For FY25, management is targeting a minimum promoter score of 3.75.

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 in 2024, current industry standard. Calls are increasingly more complex.

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

⁵ In year 3 of operational excellence, the agency will have completed 90% of our initial operational excellence plan with performance indicators

⁶ Increase production by decreasing unplanned maintenance allowing completion of planned projects on the annual plan. The agency goal is to utilize less than 30% of development hours on unplanned maintenance.

⁷ The agency created a storage solution for document retention in FY24. Over the next four years, the agency will have implemented agency-wide storage and retention of all standard operating procedures.

External Factors:

WORKFORCE TRANSITIONS AND COMPETITIVE EMPLOYMENT MARKET

Retirements of our aging workforce poses a continual challenge in transition planning and knowledge transfer. Although the Tax Commission continuously fills vacant positions, minimally qualified candidates hired to fill critical positions require complicated and advanced training. Unfortunately, recruitment efforts are inhibited by low salary ranges for critically skilled employees compared to both market rates and other state agencies.

POPULATION GROWTH

The state of Idaho continues to be a destination for retirees. Maintaining current department service levels with existing resources will continue to be a challenge. Currently, there are five Field Offices that require enhancements to accommodate the increased foot traffic and local phone calls.

TECHNOLOGICAL INNOVATIONS

With existing resources and continuous population growth, the Tax Commission will need to explore trends and adapt to technological advances. Innovative technology like artificial intelligence, chatbots, and auto attendants will improve efficiency and one-touch methods when assisting Idaho taxpayers.