IOWA
Department of Revenue

FY25 STRATEGIC PLAN

Director Mary Mosiman

IOWA
DEPARTMENT OF REVENUE

Mission

To serve Iowans through the responsible collection and generation of revenue to support the public good.

Vision

Iowa will be a state that uses innovation to make it simple to comply with revenue laws and deliver fun and fair lottery experiences.

Integrity first
Dedicated to teamwork
Ready to serve

ASSESSMENT

The Iowa Department of Revenue serves eight customer groups, as identified in Figure 1. Any assessment of IDR's strengths and limitations, as well as external threats and opportunities, applies the lens and perspectives of these customers.

IDR senior leaders outlined the organizational capabilities required to serve the identified customers. The leaders determined the strategic initiatives to be implemented to enhance selected capabilities following a strengths, weaknesses, opportunities, and threats (SWOT) analysis.

Through this analysis, they evaluated IDR's capacity to respond to customer needs and reviewed available resources, structure, services, activities, and policies that may impact the achievement of agency goals.

As one of the eight customer groups, IDR employees continue to be the Department's greatest asset and their engagement is vitally important to success. Formal and informal employee feedback drives IDR's recruitment, enrichment, and retention initiatives.

Department leadership continues to assess national and state trends directly relevant to IDR's mission.
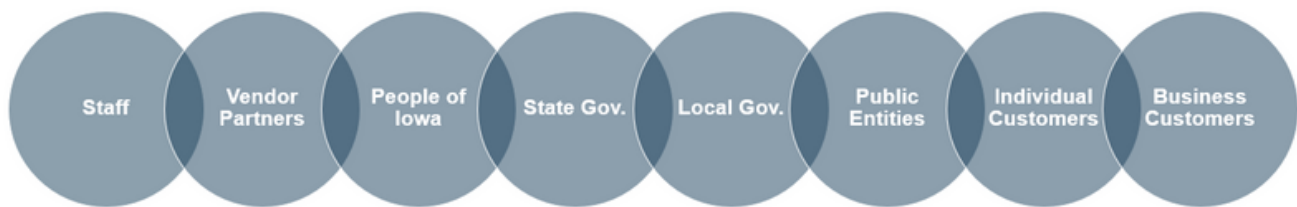

Figure 1

STRATEGIC INITIATIVES, GOALS,
& KEY PERFORMANCE INDICATORS

The two strategic initiatives identified align with three priorities of the Governor's Vision: cutting taxes, holding government accountable, and supporting health & well-being.

Responsible Revenue Generation

Goal: Complete the tax administration Modernization Program to streamline workflows, increase knowledge and improve efficiency by FY28, ending with a revenue benefit realization index greater than 1.

⭐ KPI: Utilize IMPACT and GovConnectIowa to automate front end compliance programs and reallocate resources to back end audit programs.

KPI: Reduce collections vendor costs based on automated processes and the ability to distinguish when payments were received on early case debt.

Goal: Support revenue generation from alcohol and lottery sales through a responsive, consultative selling approach by FY28.

⭐ KPI: Manage gross sales and net proceeds as compared to prior year budget performance and five year average.

KPI: Perform efficient and effective inventory management to meet the needs of the retailers and support Iowa's growing alcohol industries.

Goal: Improve revenue generation by optimizing use of collections tools and back-end compliance programs by FY28.

KPI: Increase dollar amount of established debt collected within a year of being identified.

KPI: Increase total amount of debt managed and collected for partners by 10% through expansion of centralized collections activities.

KPI: Increase dollars collected within 60 days after a recommendation is applied by the debt scoring model.

STRATEGIC INITIATIVES, GOALS, & KEY PERFORMANCE INDICATORS CONT.

Department Optimization

Goal: Improve customer service rates related to interactions with Iowans and Iowa employers by enhancing self-service and call center capabilities by FY28.

KPI: Monitor surety outcomes for the AI-supported chatbot, named "The Kernel", to ensure non-response rate is <10%.

KPI: Utilize call center statistics to reduce abandonment rate and average call wait time.

Goal: Expedite appeal processing by implementing streamlined procedures and leveraging potential automation tools to reduce the average time to close a case or move it to litigation to 18 months by FY28.

KPI: Establish a Department policy and framework for the use of Generative AI and Automation Tools.

KPI: Establish a Department framework for the assessment and evaluation of Generative AI use cases.

KPI: Bring the department appeals pilot use case to successful closure and reach a "go/no-go" decision on full implementation.