



**Department of Revenue**

**FY25 to FY27**

**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.

### **FY26 Strategic Initiatives**

Responsible Revenue Generation  
Department Optimization

**Integrity first**  
**Dedicated to teamwork**  
**Ready to serve**





## Iowa Department of Revenue

## ORGANIZATIONAL CHART

**Governor**  
Kim Reynolds

**Lt. Governor**  
Chris Cournoyer

**Director**  
Mary Mosiman

**Alcohol & Tax Operations Division**  
Sam Hoerr  
Deputy Director

**Internal Services Division**  
Darina Petkova  
Chief Operating Officer and Deputy Director

**Legal Services & Appeals Division**  
Alana Stamas  
General Counsel

**Local Government Services Division**  
Joy Kanne  
Administrator

**Lottery Division**  
Matt Strawn  
Lottery Chief Executive Officer

**Research & Policy Division**  
Robin Anderson  
Chief Economist

**Alcohol & Tax Compliance Division**  
Spencer Morehouse  
Administrator

**Financial Services Division**  
Steve French  
Chief Financial Officer



## 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.

This plan was updated on July 1, 2025.



Figure 1



## STRATEGIC INITIATIVES, GOALS, & KEY PERFORMANCE INDICATORS

In FY2026, the Department of Revenue will generate revenue for other agencies to support all of the Governor's enterprise priorities through the execution of this strategic plan. Specifically, the two strategic Department initiatives will help increase government efficiency and make it easier to do business in Iowa.

### Responsible Revenue Generation

**Goal: Complete the tax administration component of the 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 lottery sales and net proceeds as compared to current year budget performance and prior year actual performance.
- ★ KPI: Manage gross alcohol sales and net proceeds as compared to prior year actual performance

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

- 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**

### **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: Unsure responses and interactions for the AI-supported chatbot (“The Kernal”) are below 10%.
- KPI: Utilize call center statistics to reduce abandonment rate and average call wait time.
- KPI: Percent of “front-facing” web forms abandoned on GovConnectIowa is less than 50%.

**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.