REVENUE, DEPARTMENT of

Annual Performance Progress Report (APPR) for Fiscal Year (2007-2008)

Proposed KPM's for Biennium (2009-2011)

Original Submission Date: 2008

2007-2008 KPM #	2007-2008 Approved Key Performance Measures (KPMs)
1	Dollars Collected Per Revenue Agent Per Month (Personal Income Tax)
2	Percent of Property Taxes Collected.
3	Percent of Assessor's Maps Digitized in a GIS Format.
4	Taxpayer Assistance Contacts
5	Personal Income Tax Nonfiler Assessments Issued Per Employee Per Month.
6	Personal Income Tax and Corporation Tax Cases Closed Per Revenue Agent Per Month.
7	Delinquent Returns Filed After Compliance Contact Per Filing Enforcement Employee Per Month.
8	Average Days to Process Personal Income Tax Refund.
9	Percent of Personal Income Tax Returns Filed Electronically
10	Employee Work Environment (based upon a scale of 1-6)
11	Employee Training Per Year (percent receiving 20 hours per year).
12	Customer Service: Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, and availability of information.

New Delete	Proposed Key Performance Measures (KPM's) for Biennium 2009-2011
NEW	**Title:** Effective Taxpayer Assistance: Provide the most effective taxpayer assistant services by a data-driven combination of direct assistance and electronic self-help services. **Rationale:** The Legislature has directed (through budget note) that the department needs to revise KPM#4 to reflect more outcome data in contacts with taxpayers and has directed the department to return to the appropriate subcommittee of the Ways and Means or Joint Legislative Audit Committee with its proposed revision.

REVENUE, DEPARTMENT of	I. EXECUTIVE SUMMARY
Agency Mission: We make tax systems work to fund the public service that preserve and enhance the quality of life for all citizens.	

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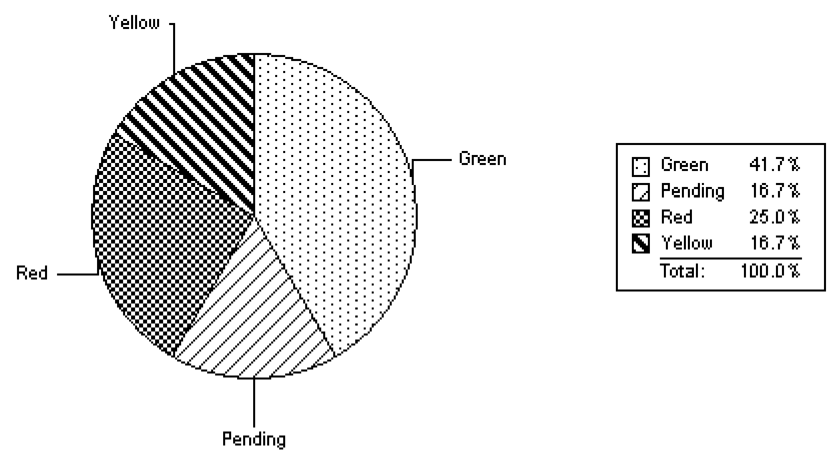
Performance Summary



Green	Yellow	Red	Exception
= Target to -5%	= Target -6% to -15%	= Target > -15%	Can not calculate status (zero entered for either Actual or Target)

1. SCOPE OF REPORT

The agency's performance measures represent the major programs within the department: the income tax and property tax programs. The measures address the agency's major functions, including collection of revenue, auditing, and taxpayer assistance.

2. THE OREGON CONTEXT

The Department of Revenue is a key partner in providing healthy tax systems and long-term stability of revenues for the State of Oregon. From our mission of making tax systems work to fund public services, to our strong values around operational excellence and fiscal responsibility, we have the

experience, skills, and mandate to help the governor and the legislature provide a bright future for all Oregonians. Our performance is guided by the agency's vision that emphasizes the importance of tax administration and service, operational excellence, and our agency work environment. We currently have 12 department performance measures that tell us how well we are doing in these areas. Our vision is designed to move and motivate the department for many years. To make it a reality, we will continue to innovate, streamline and use appropriate tools and technology.
In pursuing its goals, Department of Revenue programs contribute to the Oregon Benchmark No. 33 – "Percentage of Oregonians who understand the Oregon tax system and where tax money is spent." The following are examples of things that we have done to assist the State in making progress on this benchmark:

The agency contributes funding to the Oregon Progress Board for the survey they use to determine progress on the benchmark.
The agency issues messages on tax refund check stubs explaining how tax dollars are spent.
The agency distributes written materials to the public and to other government bodies that describe how tax dollars are used to fund public services.

3. PERFORMANCE SUMMARY

The department has identified 12 key measures of performance linked to its mission and vision and the Oregon benchmark identified above. Significant successes during the past year include:

A significant increase in the dollars collected per revenue agent per month for the personal income tax program. The productivity of the staff continues to increase with additional automated tools (KPM #1).
A significant growth in the number of personal income tax returns filed electronically. More and more taxpayers are filing electronic returns, improving the speed and efficiency of processing, and reducing costs (KPM #9).
Continued strength in support to the statewide property tax program. The continued high percent of property taxes collected in the first year indicates that local governments are receiving the resources they need to provide local services (KPM#2).
A decrease in the average days to process personal income tax refunds (KPM #8). In 2005 and 2006, the department designed and implemented a new processing system for the personal income tax program. Transition to the new system temporarily increased the time to issue rax refunds during the processing seasons of 2005 and 2006. The department is seeing the rewards of this investment in the 2007 and 2008 procesing seasons.

The department also had challenges in meeting some performance measures, including:

The percent of assessors' maps digitized in GIS format (KPM #3) has made progress but has struggled to meet goals. The department is in the final testing stages of a new automated tool that will allow counties to validate the successful migration to GIS format. We expect that the percent of Assessor's maps meeting the standard will significantly increase once the tool is put into production later in 2008.
Employee Work Environment Satisfaction (KPM #10) has continued to make progress but is still below the agency goal. We provide training and

developmental opportunities, job rotation programs, and flexible work schedules to support employees. Physical environment has been an issue, and we have recently completed installation of ergonomic furniture on the last two floors within the Revenue Building.
A struggle to provide staff with essential training (KPM #11) during a time of high workload and budget challenges. While we are not meeting our we are making progress.

4. CHALLENGES

As we look to the future, the department will continue to operate in a time of tight budget resources and growing demands. We will be challenged to find new and innovative ways of delivering services, collecting tax revenues, providing training to our employees, and maintaining the infrastructure needed to efficiently process and manage information. The agency is proud of the accomplishments it has made and continues to strive for excellence each and every day.

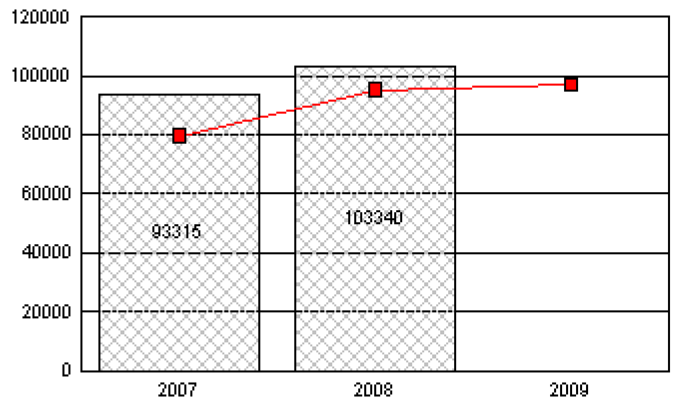
5. RESOURCES AND EFFICIENCY

The agency’s Legislatively Approved budget for the 2007-09 biennium is $182,262,653. The department made progress on its key measures over the last year, including its efficiency measures. We are looking forward to finding additional ways to use performance measures as a management tool within the agency.

KPM #1	Dollars Collected Per Revenue Agent Per Month (Personal Income Tax)	2000
Goal	Tax Administration: Provide excellent service, helping taxpayers meet their commitments with education, assistance and compliance.	
Oregon Context	This goal has no direct link to an Oregon Benchmark; it links directly to the department's mission.	
Data Source	Agent Production Reports ACTF007, PTAC Performance Measures, Cost Allocation System (CAS); based on productivity per position.	
Owner	Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Dollars Collected Per Revenue Agent Per Month

Bar is actual, line is target



Data is represented by currency

1. OUR STRATEGY

Our strategy is to maintain a workforce of skilled employees who are provided with essential collection tools and technology. We evaluate the effectiveness of collection staff in collecting delinquent tax debt; analyze the type and age of delinquent debt; and evaluate the use of additional collection tools.

2. ABOUT THE TARGETS

The target measures the productivity of collection staff, based on the dollars collected per position. The higher the level achieved, the greater the productivity.

3. HOW WE ARE DOING

In 2008 the target for dollars collected was $95,156. We collected $103,340 in 2008, significantly exceeding our target. The kicker and stimulus checks had a positive impact on this measure.

4. HOW WE COMPARE

It is difficult to compare Oregon's performance with other states, given the widely diverse tax structures of different states.

5. FACTORS AFFECTING RESULTS

The department exceeded its target for the year, aided by increased use of automated tools such as system offset and by increased use of payment plans.

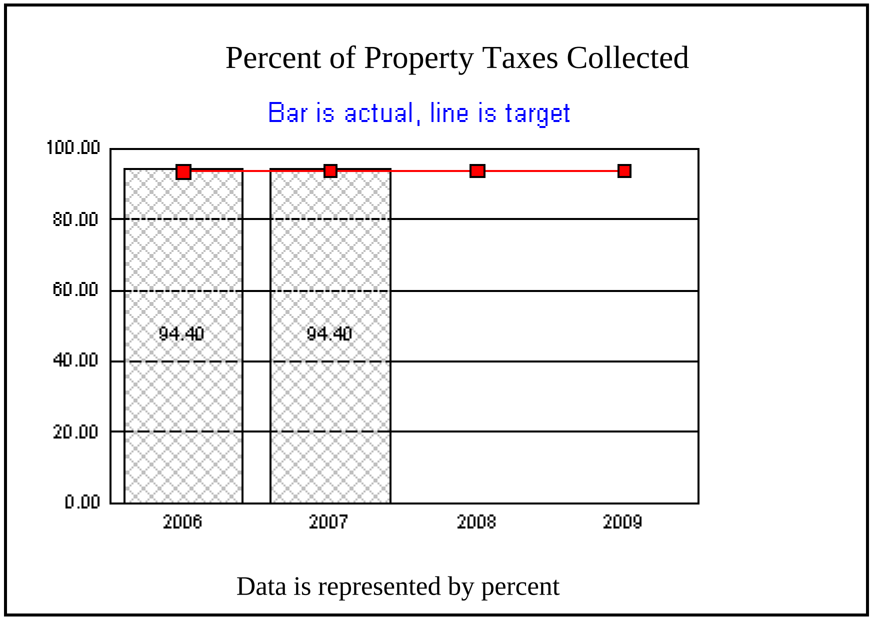
6. WHAT NEEDS TO BE DONE

With ongoing turnover of staff due to promotion and retirement, recruiting and training new staff is a constant challenge. We need to continue to evaluate how to streamline our technical training.

7. ABOUT THE DATA

The reporting cycle is Oregon's fiscal year. The department's internal auditor reviewed the measure and reported that the calculations for fiscal 2007 and 2008 appear to be accurate, documented, and repeatable.

KPM #2	Percent of Property Taxes Collected.	2000
Goal	Tax Administration: Partner with local governments to promote a healthy and consistent property tax system.	
Oregon Context	This goal has no direct link to Oregon benchmark; it links directly to the department's mission.	
Data Source	Oregon Property Tax Statistics (various years); Property Tax certified, Property Tax Collection, and Total Uncollected report.	
Owner	Jim Bucholz, Property Tax Division Administrator	



1. OUR STRATEGY

Our strategy is to provide training of county collection staff, and develop and maintain support materials to help counties collect identified property taxes.

2. ABOUT THE TARGETS

The target measures the degree to which counties are able to timely collect identified property taxes. The higher the percentage of taxes collected, the better, as most units of local government rely heavily on property taxes to fund local services.

3. HOW WE ARE DOING

The 2007 target was 93.8%. Actual performance for 2007 was 94.4%, slightly more than a percentage point above the target. This continues the ongoing strength in this measure.

4. HOW WE COMPARE

Comparable data is not available.

5. FACTORS AFFECTING RESULTS

Data reveals the counties are collecting a high percentage of the total property taxes that are due and are managing their accounts receivable well. Additional research has shown that, by the end of the third year following the initial billing, the counties have received about 99.7 percent of the taxes due for that year. The statistics show a high degree of effectiveness in maintaining timely collection activities for the property tax year.

6. WHAT NEEDS TO BE DONE

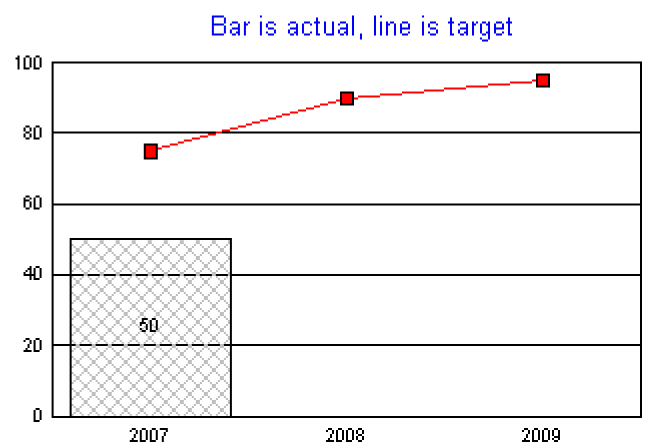
Continue partnerships with county collection offices.

7. ABOUT THE DATA

The reporting cycle is the Oregon fiscal year. The data is self-reported by each of the 36 counties and uses the same methodology as is used for the Health of the Property Tax System publication.

KPM #3	Percent of Assessor's Maps Digitized in a GIS Format.	2004
Goal	Operational Excellence: Adopt best business practices, taking advantage of technology to improve our system and processes.	
Oregon Context	This goal has no direct link to Oregon benchmark; it links directly to the department's mission	
Data Source	Oregon Map Project (ORMAP).	
Owner	Jim Bucholz, Property Tax Division Administrator	

Percent of Assessor's Maps Migrated to GIS Format



Data is represented by percent

1. OUR STRATEGY

Our strategy is to partner with counties to migrate digitized property tax maps into GIS format, providing employees and business partners with easy access to accurate property tax map information.

2. ABOUT THE TARGETS

The long-term target is to have a totally digital statewide property tax map by the year 2012. This will require transforming all the county’s assessors’ maps into a GIS format by that date. The higher the percentage, the better the performance.

3. HOW WE ARE DOING

As of the end of 2007, we are at 50% of the overall goal. We are currently in the testing stages of an automated tool that will enable counties to test conformity to ORMAP technical requirements, which will validate successful migration to GIS format. We expect that the percent of Assessor’s maps meeting the standard will significantly increase once the tool is put into production later in 2008.

4. HOW WE COMPARE

This measure is difficult to evaluate across jurisdictions because of differing technology and terminology. Jurisdictions in many states are in the process of converting their tax lot base to GIS. Few, however, are doing it from the statewide level.

5. FACTORS AFFECTING RESULTS

Funding challenges and a scarcity of skilled staff at both the state and local level may make it difficult to meet future targets.

6. WHAT NEEDS TO BE DONE

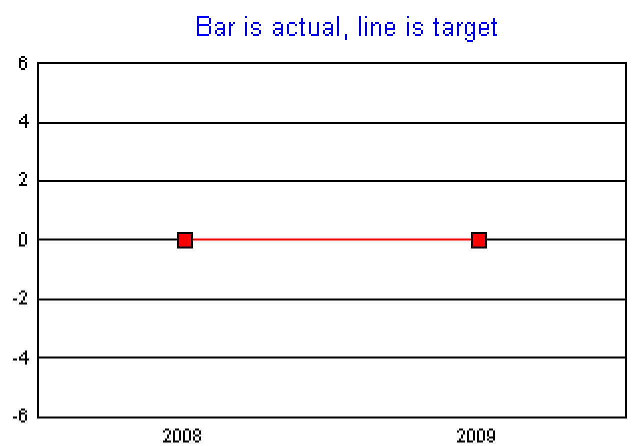
The department needs to continue to partner with counties to manage and fund remapping efforts aimed at improving access to assessor map information.

7. ABOUT THE DATA

The reporting cycle is Oregon’s fiscal year. The department’s internal auditor will be reviewing this measure for fiscal years 2006 and 2007, as of 8/27/2008 a conclusion has not been reached.

KPM #4	Taxpayer Assistance Contacts	2000
Goal	Tax Administration: Provide excellent service, helping taxpayers meet their commitments with education, assistance, and compliance.	
Oregon Context	This goal has no direct link to an Oregon Benchmark; it links directly to the department's mission.	
Data Source	Web site hits and Tax Services calls	
Owner	Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Taxpayer Assistance Contacts



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1. OUR STRATEGY

Our strategy is to continue to use the Internet and telephone effectively to educate the public and to assist taxpayers in meeting their filing responsibilities.

2. ABOUT THE TARGETS

The targets project a continued growth in the use of the Internet and telephone to help provide customer service and promote long-term tax compliance. The higher the target, the more contacts we have with taxpayers.

3. HOW WE ARE DOING

Taxpayers are becoming more comfortable using the Internet as a way of getting tax information and forms. We have made significant progress in answering the needs of taxpayers through a variety of methods.

4. HOW WE COMPARE

Comparable data is not available.

5. FACTORS AFFECTING RESULTS

The department has provided more information such as “Where’s My Refund?” on the Web site so that taxpayers have easier access to commonly asked questions.

6. WHAT NEEDS TO BE DONE

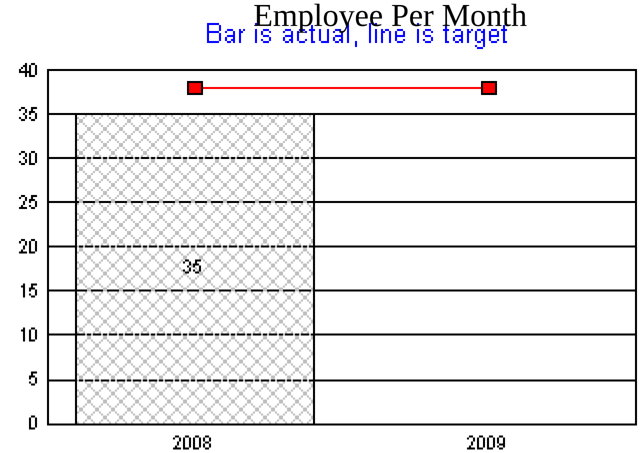
The department is continuing to evaluate how to provide more information through the Web, as well as planning to update the department’s Interactive Voice Response System.

7. ABOUT THE DATA

The reporting cycle is the Oregon fiscal year. The department’s Web site is now being administered by DAS’ e-gov program, and Web site “hits” are being counted differently than in previous years and are not comparable. This performance measure is being changed per direction from the Legislature and is being presented to the Interim Ways & Means Committee September 2008.

KPM #5	Personal Income Tax Nonfiler Assessments Issued Per Employee Per Month.	2000
Goal	Tax Administration: Provide excellent service, helping taxpayers meet their commitments with education, assistance and compliance.	
Oregon Context	This goal links to the department’s mission and Oregon benchmark.	
Data Source	Cost Allocation System (CAS) and Filing Enforcement Monthly Reports, based on productivity per position.	
Owner	Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Personal Income Tax Nonfiler Assessments Issued Per Employee Per Month



Data is represented by number

1. OUR STRATEGY

Our strategy is to develop filing enforcement tools, techniques and data sources that will improve the accuracy of our information and help the department assist taxpayers in filing.

2. ABOUT THE TARGETS

The department is moving to emphasize voluntary filing of tax returns by taxpayers (KPM#7). As that effort increases, we will not be sending as many assessments of tax due to taxpayers. As a result, we are projecting that the number of assessments per employee will decline over time.

3. HOW WE ARE DOING

The 2008 performance resulted in slightly less assessments issued per employee than our 2008 target. The implementation of a new automated application (NETS) in 2007 has had an impact in the number of assessments per month because of the time people needed to learn the new system. As we complete the change in focus, we anticipate that the number of assessments will drop in favor of more voluntarily filed returns.

4. HOW WE COMPARE

Comparable data is not available.

5. FACTORS AFFECTING RESULTS

We are continuing to refine the tools and skills needed to encourage and assist taxpayers to file their returns voluntarily.

6. WHAT NEEDS TO BE DONE

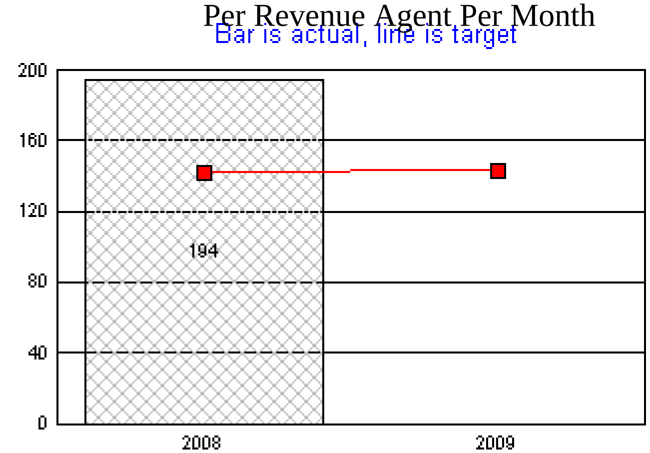
The department recently developed an automated application (NETS) that will help staff provide more accurate and complete information to assist taxpayers in completing their returns and will help us shift the focus to voluntarily filed returns.

7. ABOUT THE DATA

The reporting cycle is Oregon fiscal year.

KPM #6	Personal Income Tax and Corporation Tax Cases Closed Per Revenue Agent Per Month.	2000
Goal	Tax Administration: Provide excellent service, helping taxpayers meet their commitments with education, assistance, and compliance.	
Oregon Context	This goal has no direct link to Oregon benchmark; it links directly to the department's mission.	
Data Source	Data from Agent Production Reports ACTF007 and FTE from Cost Allocation System (CAS), based on productivity per position.	
Owner	Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Personal Income Tax and Corporation Tax Cases Closed Per Revenue Agent Per Month



Data is represented by number

1. OUR STRATEGY

Our strategy is to provide collection staff with tools and training to resolve collection cases quickly. The measure evaluates the effectiveness of staff in working with taxpayers to close cases.

2. ABOUT THE TARGETS

The target reflects steady growth in cases closed per revenue agent. A higher number is better.

3. HOW WE ARE DOING

In 2008, the number of cases closed per agent was 194, compared to the target of 142. The kicker and stimulus checks had a positive impact on this measure. We are continuing to increase productivity.

4. HOW WE COMPARE

Comparable data is not available.

5. FACTORS AFFECTING RESULTS

We are continuing to analyze the type and age of delinquent debts and work to ensure that agents are focusing their efforts effectively.

6. WHAT NEEDS TO BE DONE

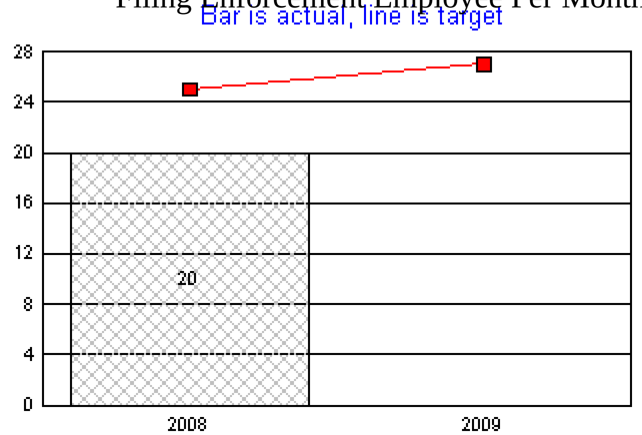
The department is evaluating new collection tools and performing an in-depth analysis of unpaid tax debt to ensure we are maximizing effectiveness of our staff.

7. ABOUT THE DATA

The reporting cycle is the Oregon fiscal year.

KPM #7	Delinquent Returns Filed After Compliance Contact Per Filing Enforcement Employee Per Month.	2001
Goal	Tax Administration: Provide excellent service, helping taxpayers meet their commitments with education, assistance and compliance.	
Oregon Context	This goal links to the department’s mission and Oregon benchmark 33.	
Data Source	Cost Allocation System (CAS) and Filing Enforcement Monthly Reports, based on productivity per position	
Owner	Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Delinquent Returns Filed After Compliance Contact Per Filing Enforcement Employee Per Month.



Data is represented by number

1. OUR STRATEGY

Our strategy is to identify non-filing taxpayers and encourage them to file their own returns. If taxpayers voluntarily comply by filing their own returns, we believe there is a higher likelihood of their future tax compliance.

2. ABOUT THE TARGETS

The department is emphasizing voluntary filing of tax returns by taxpayers. As that effort increases, we will produce fewer assessments of tax due (as measured in KPM#5) and will encourage taxpayers to file after compliance contact with the department. Higher is better.

3. HOW WE ARE DOING

The 2008 target was 25; actual performance for 2008 was 20. The number is low because of the learning curve in implementing the NETS system, staff being used for high priority special projects, and difficulty in keeping positions filled.

4. HOW WE COMPARE

Comparable data is not available.

5. FACTORS AFFECTING RESULTS

The department has provided training for employees, emphasizing the need to contact taxpayers quickly and work toward voluntary compliance.

6. WHAT NEEDS TO BE DONE

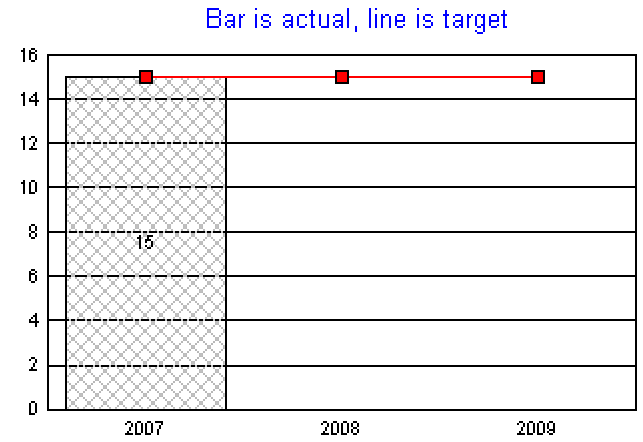
The department recently developed an automated application that will help staff provide more accurate and complete information to assist taxpayers in completing their returns and help with the focus on voluntarily filed returns.

7. ABOUT THE DATA

The reporting cycle is Oregon fiscal year.

KPM #8	Average Days to Process Personal Income Tax Refund.	1999
Goal	We adopt best business practices to make tax systems work better. And take full advantage of opportunities presented by new technology.	
Oregon Context	This Goal has no direct link to Oregon benchmark; it links directly to the department's mission.	
Data Source	Personal income tax return processing system.	
Owner	Larry Hinton, Administrative Services Division Administrator, and Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Average Days to Process Personal Income Tax Refund



Data is represented by number

1. OUR STRATEGY

Our strategy is to generate Personal Income Tax refunds in a timely manner, through the efficient use of staff and systems.

2. ABOUT THE TARGETS

The targets are based on generating refunds within a 15-day period in the future. This target is aggressive and demands careful planning. Lower is better for this measure.

3. HOW WE ARE DOING

In 2007, the target was 15 days; actual performance for 2007 was 15. The department did not meet the targets in 2005 and 2006 due to the implementation of a new processing system in 2005-06.

4. HOW WE COMPARE

Oregon's targets and usual performance are comparable with other states.

5. FACTORS AFFECTING RESULTS

The department has been implementing a new processing system with reduced resources. These challenges initially slowed the processing seasons in 2005 and 2006.

6. WHAT NEEDS TO BE DONE

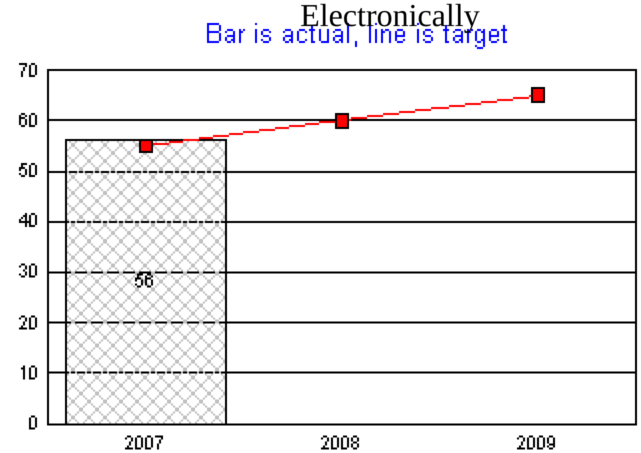
With the successful implementation of the new processing system, the department is working to return to the 15-day target.

7. ABOUT THE DATA

The reporting cycle is Oregon calendar year in which returns for the preceding tax year are being processed (Example during the 2007 calendar year DOR processed 2006 Tax Returns). Note; the data does not include suspended and amended returns (12% in 2006 and 11% in 2007) because they are extensive manual processes and as such outliers to normal return processing. The department's internal auditor reviewed the measure and reported that the calculations for calendar years 2006 and 2007 appear to be accurate, documented, and repeatable. He mentioned that data sets previous to calendar year 2006 are not consistent with calendar year 2006 and 2007 as the ITX system has been fully operational as of tax year 2005 and is believed to provide more accurate reporting.

KPM #9	Percent of Personal Income Tax Returns Filed Electronically	2002
Goal	Operational Excellence: Adopt best business practices, taking advantage of technology to improve our system and processes.	
Oregon Context	This goal has no direct link to an Oregon benchmark; it links directly to the department's mission.	
Data Source	Personal income tax return processing system statistics for electronically filed returns.	
Owner	Larry Hinton, Administrative Services Division Administrator, and Marvin Rhodes, Personal Tax and Compliance Administrator	

Percent of Personal Income Tax Returns Filed Electronically



Data is represented by percent

1. OUR STRATEGY

Our strategy is to improve customer service and efficiency by increasing the percent of personal income tax returns filing electronically. Electronically filed returns are faster and less expensive to process.

2. ABOUT THE TARGETS

The targets were recently revised upward to reflect the strong growth in e-filing at the state and federal level. Higher is better.

3. HOW WE ARE DOING

The 2007 target was 55%; actual 2007 performance was 56%.

4. HOW WE COMPARE

Oregon’s rate of electronic filing is comparable with other states.

5. FACTORS AFFECTING RESULTS

Since Oregon’s electronic filing is tied with the federal return, we benefit as more taxpayers choose to file their federal tax returns electronically.

6. WHAT NEEDS TO BE DONE

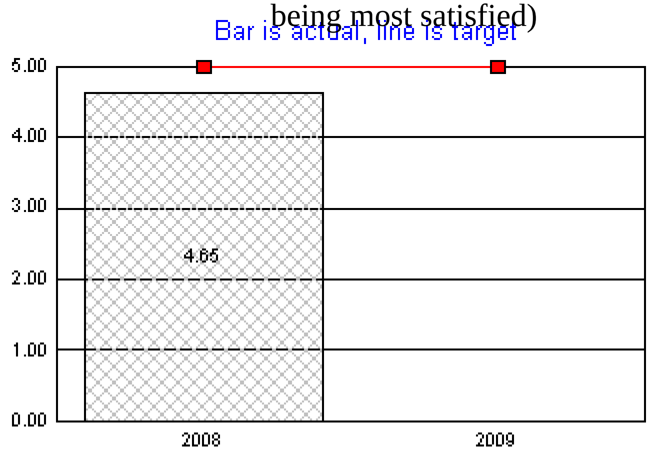
The department needs to continue emphasizing and marketing the benefits of electronic filing. In addition, we will continue to work with software vendors to provide easy methods to add state electronic filing to federal electronic filing of returns.

7. ABOUT THE DATA

The reporting cycle is the Oregon calendar year in which returns for the preceding tax year are being processed. (Example, in the 2007 calendar year DOR processed 2006 Tax Returns.) The department’s internal auditor reviewed the measure and reported that the calculations for calendar years 2006 and 2007 appear to be accurate, documented, and repeatable.

KPM #10	Employee Work Environment (based upon a scale of 1-6)	2002
Goal	Work Environment: Provide a positive, productive, and welcoming work environment.	
Oregon Context	This goal has no direct link to Oregon benchmark; it links directly to the department's mission.	
Data Source	Employee survey conducted by the agency's Workforce Environment Council.	
Owner	Sandy Faber, Human Resources Section Manager	

Employee Work Environment Satisfaction (scale 1-6; 6 being most satisfied)



Data is represented by number

1. OUR STRATEGY

Our strategy is to provide employees with the physical environment, support and resources needed to do their jobs well.

2. ABOUT THE TARGETS

Employees rate their work environment on a scale of 1-6, with 1=very dissatisfied to 6=very satisfied. The targets are 5.25, reflecting a rating above "satisfied". Higher rating is better.

3. HOW WE ARE DOING

The 2008 target was 5.25; actual 2008 performance was 4.65. The results showed that people are generally satisfied with their work environment.

4. HOW WE COMPARE

Comparable data is not available.

5. FACTORS AFFECTING RESULTS

We provide training and developmental opportunities, job rotation programs, and flexible work schedules to support employees. Physical environment has been an issue, and we have recently completed installation of ergonomic furniture on the last two floors within the Revenue Building.

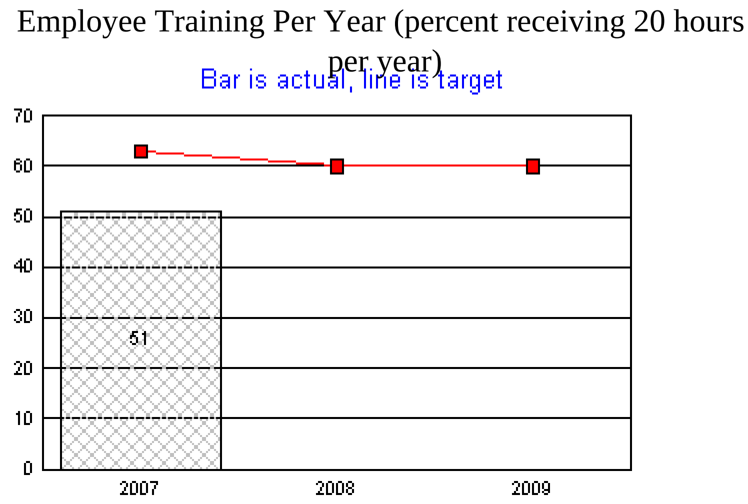
6. WHAT NEEDS TO BE DONE

The department plans to complete installation of ergonomic mail opening equipment in the Processing Center.

7. ABOUT THE DATA

The reporting cycle is Oregon fiscal year.

KPM #11	Employee Training Per Year (percent receiving 20 hours per year).	2000
Goal	Work Environment: Provide a positive, productive, and welcoming work environment.	
Oregon Context	This goal links to the department's mission and Oregon benchmark 29.	
Data Source	Agency Cost Allocation System (CAS).	
Owner	Sandy Faber, Human Resources Manager	



Data is represented by percent

1. OUR STRATEGY

This measure demonstrates the importance placed on employee development and the commitment of resources towards training.

2. ABOUT THE TARGETS

Oregon Benchmark 29: Labor Force Skills Training – measures percentage of Oregonians in the labor force who received at least 20 hours of skills training the past year. Our target is based on the percentage of employees who receive that training. Higher is better.

3. HOW WE ARE DOING

The 2007 target was 63%; actual performance for 2007 was 51%. The department is not meeting its training targets. We rebounded from the effects of layoff in 2003 but are still struggling to maintain our momentum.

4. HOW WE COMPARE

The 2003 Oregon Benchmark Report notes that there has been little progress on Oregon Benchmark 29.

5. FACTORS AFFECTING RESULTS

Due to budget shortfalls, the department cut back it training for staff in 2002-03. During 2003-04, we started to reinstate an active training program. Ongoing budget challenges, however, have made progress difficult.

6. WHAT NEEDS TO BE DONE

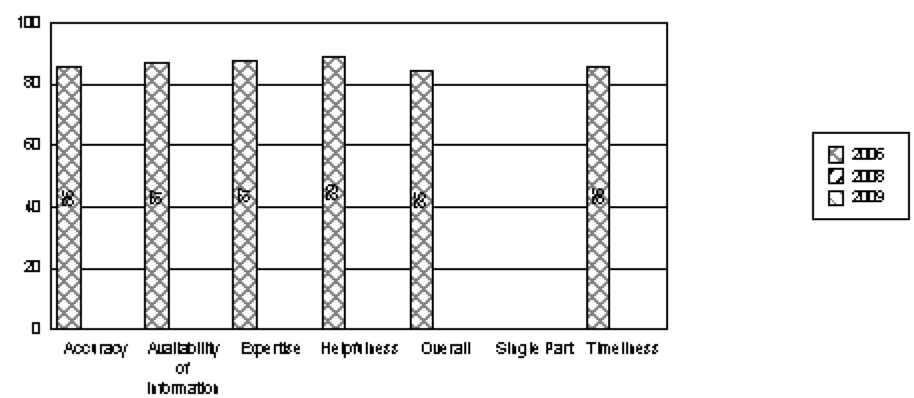
The department needs to continue to place a high priority on employee training and to look for creative, low-cost ways to deliver the training.

7. ABOUT THE DATA

The reporting cycle is Oregon fiscal year. Data comes from coding on timesheets. The department expects to have the automated system iLearn Oregon in place by Septemebr 2008 which should help with the under-reporting problem. Managers are responsible for insuring the accuracy of reporting training with limited review for accuracy by payroll or Human Resources.

KPM #12	Customer Service: Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, and availability of information.	2006
Goal	Tax Administration: Provide excellent service to taxpayers in a timely manner.	
Oregon Context	This goal links to department’s mission.	
Data Source	Written surveys of walk-in customers at our field offices or main building; telephone surveys of randomly selected taxpayer calls.	
Owner	Marvin Rhodes, Personal Tax and Compliance Division Administrator	

Agency Performance Average of Tax Services Survey



1. OUR STRATEGY

Our strategy is to provide excellent customer service to taxpayers who visit our field offices or call our Tax Services Unit for assistance, as measured by surveys of our customers.

2. ABOUT THE TARGETS

With only the initial year of experience, we have set the targets for all components at 90%. Higher percentage is better.

3. HOW WE ARE DOING

Based on the initial survey results, it appears customers are generally satisfied with the service they receive when they visit our field offices or call Tax Services Unit."

4. HOW WE COMPARE

We will look at results from other state agencies for comparable data.

5. FACTORS AFFECTING RESULTS

With only one year of data, it is difficult to analyze factors that are affecting the results.

6. WHAT NEEDS TO BE DONE

The department will continue to emphasize the importance of customer service in all areas, including timeliness, accuracy, helpfulness, expertise and availability of information.

7. ABOUT THE DATA

The data was reported for the 2006 tax season. All taxpayers who visited field offices during that period were asked to complete a survey. In addition, the department did a random sampling of callers to our Tax Services Unit. The data included only those callers who agreed to complete a survey. The survey results have been adjusted to reflect the estimated number of non-respondents, and the next survey in 2008 will capture this data.

REVENUE, DEPARTMENT of	III. USING PERFORMANCE DATA
Agency Mission: We make tax systems work to fund the public service that preserve and enhance the quality of life for all citizens.	

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The following questions indicate how performance measures and data are used for management and accountability purposes.	
1. INCLUSIVITY	*** Staff :** Staff are involved in reviewing our agency mission, vision and values, which are supported by the performance measures. Agency staff provided input for the development of the performance measures at the time they were established. They also review the measures and recommend modifications as appropriate. *** Elected Officials:** Elected Officials review the performance measures as part of the legislative process. *** Stakeholders:** Stakeholders are consulted regarding the measures as appropriate. *** Citizens:** Citizens review the performance measures on the department's Web site and submit questions and comments.
2 MANAGING FOR RESULTS	Performance measures are used as key indicators of the agency's progress toward achievement of its long-term vision. They are also used as indicators of progress made in projected efficiency gains as a result of automation. The agency uses internal measures and division and agency level dashboards to track internal indicators and manage to outcomes.
3 STAFF TRAINING	Management Team members and managers involved in preparing and updating the department's performance measures attended training and informational sessions sponsored by the Progress Board. Other agency managers have also attended training classes on performance measurement and have brought the knowledge gained at those classes back to the agency. In addition, managers have reviewed training and information posted on the Progress Board's Web site.
4 COMMUNICATING RESULTS	*** Staff :** Staff reviews the measures on the department's internal Web site to monitor progress and evaluate

	performance in key department areas. Agency managers review the updated performance measures annually. Based upon their review, processes may be changed or problems/trends identified which are then addressed. *** Elected Officials:** Elected Officials review the performance measures and evaluate the department's effectiveness as part of the department's budget process. The measures are also included in the Agency Business Plan provided to the legislature and other elected officials: *** Stakeholders:** Stakeholders review the measures on the department's external Web site and may ask questions or make suggestions. *** Citizens:** Citizens review the measures on the department's external Web site and may ask questions or make suggestions.