

Strategic Plan



FY 2025 - 2028

UTAH STATE TAX COMMISSION
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EXECUTIVE SUMMARY



TAX COMMISSION MISSION

"Promote tax and motor vehicle law compliance."

Through his "Utah Home" initiative, Governor Cox is committed to building a sustainable future for current and future generations of Utahns while ensuring equal opportunities for all. One of the guiding pillars of this initiative is "Good Government – customer service, employee retention, and wise use of Utah's resources." Following the governor's priorities, the Tax Commission's mission is to promote tax and motor vehicle law compliance. To do this, we provide excellent customer service, using innovations that both assist customers and enable employees to provide those services.

The Tax Commission intends to accomplish our mission by way of three goals:

1. Make compliance easier by promoting innovation and leveraging technology.
2. Enhance the customer experience by fostering relationships with community partners, facilitating effective contacts, increasing customer support options, and providing greater access to underserved communities.
3. Promote a quality work environment and sound agency leadership by empowering employees, integrating performance management and providing strong leadership and accountable administration.

We see the Tax Commission as being in a partnership with the Governor's Office, the Legislature and other state organizations to provide help and guidance, while administering Utah tax and motor vehicle laws in the most effective way possible. At the heart of our agency are over 700 dedicated employees – some of the hardest working, most technically-skilled, and dedicated workers in the state. We are here to help our customers and make compliance easier.

This is a living document and will be updated as needed to ensure it is timely and relevant, and that it reflects the priorities that are important to the State of Utah. We are ready to help the citizens of Utah!

Scott Smith
Tax Commission Executive Director

WHO WE ARE

The Utah Constitution establishes the State Tax Commission in Article 13, section 6. Of the four Commission members, only two may belong to the same political party. With the consent of the Senate, the Governor appoints each commissioner to a four-year term.

Utah Code, Title 59, provides for the composition of the commission based on the qualifications of the members. Title 59

also requires the Governor to designate one of the commissioners as chairperson of the Commission. Additionally, Title 59 requires the commission to appoint an executive director who, through both statute and an administrative plan, hires additional staff to perform the agency's duties and responsibilities.

Duties & Functions

The Tax Commission's constitutional and statutory duties include the following:

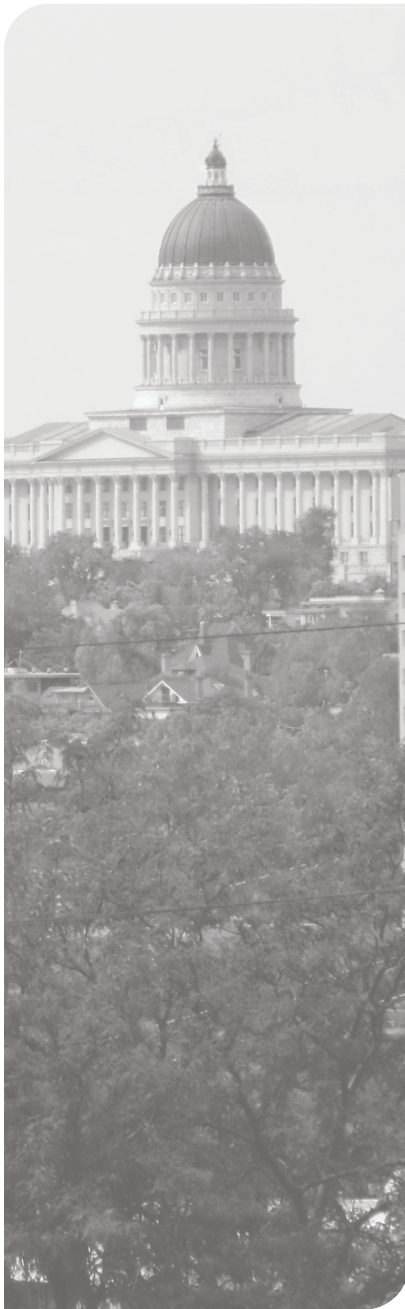
- Administers and supervises Utah's tax and motor vehicle laws
- Assesses mines and public utilities
- Adjusts and equalizes property valuation and assessment among counties
- Has other powers and performs other duties as provided by statute.

In order to perform these duties, the Tax Commission:

- Receives and deposits tax revenue.
- Processes Utah tax returns.
- Updates and maintains taxpayer information.
- Reviews tax returns for accuracy.
- Performs audits to ensure compliance.

- Helps taxpayers resolve filing and account problems.
- Oversees county property assessments and tax systems.
- Appraises and assesses public utilities, mines and transportation companies.
- Registers and titles Utah motor vehicles and motor carriers.
- Regulates the motor vehicle sales industry.
- Enforces motor vehicle laws.
- Provides information to the public about Utah tax laws and rates.
- Works closely with government, civic and industry partners.

The Tax Commission employs over 700 full-time equivalent employees in its operations.



Tax Commission Organization

The commissioners oversee the Tax Commission's organization through the Office of the Commission.



OFFICE OF THE COMMISSION

- Appeals
- Internal Audit
- Economics & Statistics

Through a management agreement, and in consultation with the Governor and with advice and consent of the Senate, the four commissioners appoint an executive director.



OFFICE OF THE EXECUTIVE DIRECTOR

The executive director oversees the day-to-day operations of the Tax Commission. In addition to the operational area, the agency is divided into four functional areas, each of which contains divisions that perform distinct functions.



Office of the Commission

The Office of the Commission conducts administrative hearings on state tax matters. Taxpayers who disagree with decisions of a Tax Commission

division and/or a county board of equalization may appeal to the Tax Commission, which has final review authority of the administrative appeals process. Taxpayers may appeal a final Tax Commission decision, after exhausting all administrative remedies, to a district court or the Utah State Supreme Court. In addition, the Office

of the Commission performs internal audit functions of the Tax Commission through an Internal Audit Unit. Finally, the Office of the Commission has an Economic and Statistical Unit that performs data and economic analysis, prepares fiscal impact responses for the Tax Commission, and assists in the appeals process.



Office of the Executive Director

The Operations area provides services and support to all Tax Commission functional areas.

This area performs:

- Security, privacy, record management and disclosure, and IRS communications.
- Oversight of tax and motor vehicle computer systems¹.
- Legislation implementation and planning management.
- Media relations.
- Forms design.
- Management of tax information and instructions.
- Website design and management.
- Budgeting, purchasing and accounting functions.



Customer Service Functional Area

The Customer Service functional area provides customer support across multiple areas, including delinquent taxes and the Motor Vehicle Division (DMV).

DMV – Customer Service Division

The DMV-Customer Service Division provides services to the public for all motor vehicle transactions with a focus on

excellent customer service. DMV's primary duty is to title and register vehicles, including passenger vehicles, trucks, trailers, motorcycles, motor homes, off-highway vehicles, boats and snowmobiles.

Special Services Division

The Special Services Division provides support services for collection activities and manages the Collections Contact Center, which handles all inbound communication on collection issues. Support services include bankruptcy, garnishments, tax clearance, special events, waivers and offers-in-compromise. This support allows collection agents to focus on working with customers to resolve balances.

Collections Division

The Collections Division collects delinquent accounts where a lien has been issued and possible legal action may occur. The focus is on collections through excellent customer experience and working with customers to pay delinquent balances in a timely manner.



Property & Miscellaneous Tax Functional Area

The Property & Miscellaneous Tax functional area performs its duties through three divisions.

Centrally Assessed Division

The Centrally Assessed Division performs the direct appraisal and assessments of all multi-county or multistate properties including transportation company properties, properties of public utilities and airlines, geothermal resources, and mining properties. Centrally assessed property includes property of power companies, railroads, airlines, pipelines, oil and gas, metal mines, coal mines, sand and gravel, and other non-metal mines.

Certified Rates & Miscellaneous Taxes Division

The Certified Rates & Miscellaneous Taxes Division oversees Utah's certified tax rate process, and consults with and monitors the county auditors and treasurers regarding statutory requirements for this process. The miscellaneous tax sections educate, assist and audit taxpayers who file miscellaneous taxes, including taxes or fees on beer and liquor, brine shrimp harvesting, fuel, motor fuel, special fuel, aviation fuel, insurance premiums, self-insurers, radioactive waste and the environmental assurance



¹ FAST Enterprises, LLC (FAST), is a third-party vendor that developed, owns, and is the provider of Utah's tax and motor vehicle systems, GenTax and VADRS. FAST has been a long-term partner for support and improvement of these systems for the past 18 years. The tax system is used by 35 states and 14 municipal governments, as well as 3 Canadian provinces and 6 additional countries. The motor vehicle system is used in 22 states.

fee. The division also administers the International Fuel Tax Agreement (IFTA).

The personal property section provides statutory auditing services for Utah counties to audit local business personal property accounts and recommends annual updates to Personal Property Valuation Guides and Schedules.

Property Tax Division

The Property Tax Division provides oversight of county property assessments and tax systems, performs assessment/sales ratio studies, and conducts performance reviews of county appraisal systems. This division also provides technical assistance and develops Standards of Practice for local assessment, and tax collection, as well as farmland assessment evaluation and classification.

The education section provides appraisal education and training for all state and county appraisers. The mineral section performs federal and state audits of mining and oil and gas severance tax, as well as mineral production tax withholding, to ensure compliance.



Tax and Revenue Functional Area

The Tax and Revenue Functional Area is responsible for:

- Providing timely and accurate information to local taxing authorities.



- Processing tax applications and returns and depositing tax payments.
- Correcting problem returns so they can be posted to the tax systems.
- Giving accurate information to taxpayers, both over the phone and in writing, so they can report properly.
- Reducing noncompliance and issuance of improper refunds.
- Educating taxpayers through reviews and examinations to reduce repeat errors.

Three divisions carry out these functions:

Business Taxes and Discovery Division

The Business Taxes and Discovery Division enhances sales and use tax and corporate tax compliance through taxpayer training, outreach programs, reviews and examinations. Reviews and examinations focus on educating taxpayers to reduce errors and to level the playing field for those who are not complying with their tax responsibilities.

Financial Operations Division

The Financial Operations Division receives, extracts and examines all incoming returns, documents and

correspondence. They deposit all tax and fee payments. They capture return documents into the tax systems and review and approves account applications and maintain account demographics. They also perform error corrections to ensure accurate information is posted to the tax systems. This division records and classifies revenue and reconciles it to the general ledger. Acting in a fiduciary capacity for various local government entities, this division accounts for and distributes assets held by the state for various local government entities.

Finally, this division assesses financial conditions and operating results by comparing current cash flows and actual results to previous years.

Income and Education Division

The Income and Education Division provides assistance to taxpayers with tax obligations and tax questions. A team of tax examiners assists CPAs and tax preparers who have more complex tax questions. They offer outreach training and tools such as webinars, frequently asked questions and a chatbot that helps with tax filing and questions. They also review and examine income, partnership and withholding returns to help customers comply with tax laws and perform an upfront review of returns to ensure refunds are not issued in error.



Enforcement

The Enforcement Functional Area provides motor vehicle title and dealer enforcement and customer service through two divisions. It also enforces laws related to motor vehicles and cigarettes, CBD and tobacco.

Motor Vehicle Enforcement Division (MVED)

The Motor Vehicle Enforcement Division renews dealer and related licenses and investigates motor vehicle related crimes, such as odometer fraud and title fraud and any motor vehicle-related fraud committed by licensed automobile dealers under Utah Code, Title 41, Chapter 3, Motor Vehicle Business Regulation Act.

Motor Vehicle Division (DMV) Title & Dealer Services

DMV Title & Dealer Services provides motor vehicle transaction customer service. They help licensed motor vehicle

dealers in titling and registering their vehicle sales through centralized locations throughout Utah, process all types of motor vehicle transactions, and help licensed tow yards and other law enforcement agencies return impounded vehicles to their rightful owners. In addition, they review all out-of-state vehicle titles that come into Utah for title validity, salvage concerns, and any other fraudulent title trends.

Two other functions of the Enforcement Functional Area are the Criminal Investigative Unit (CIU) and Cigarette, CBD and Tobacco Enforcement Section.

CIU is a special functions law enforcement section that investigates delinquent tax fraud cases. If a resolution cannot be reached with the taxpayer, CIU works with the Utah Attorney General's Office to recover the unpaid tax.

The Cigarette, CBD and Tobacco Enforcement Section enforces applicable Utah laws through audits and inspections, as well as provides education to distributors.



WHAT DRIVES US



Mission

Promote tax and motor vehicle law compliance.



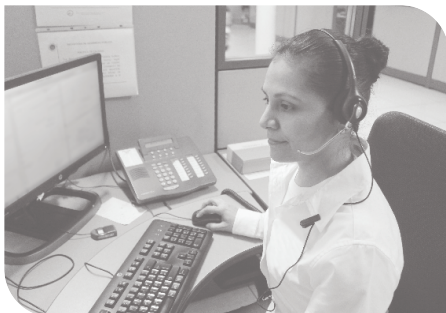
Vision

Provide valuable customer service by making compliance easier, non-compliance harder, and by protecting sensitive customer information.



Values

- Public trust
- Quality and accuracy
- Efficiency and effectiveness
- Job expertise and knowledge with consistent and dependable application of laws, rules, practices and procedures
- Integrity, including honesty, trustworthiness and respect for self and others
- Clear, meaningful and concise communication with customers
- Self-motivated employees and environments that encourage initiative
- Empowered employees with corresponding accountability



AGENCY GOAL ONE

GOAL 1



Make Compliance Easier by **Promoting Innovation and Leveraging Technology.**

OBJECTIVE 1

Develop a culture of technological innovation and process improvement in order to ensure services meet increasing growth and demand.

Strategies

- 1 Develop, enhance and support innovative electronic tools to assist customers in timely, effective, efficient and convenient service delivery and completion.

OBJECTIVE 2

Ensure our systems are up-to-date and secure.

Strategies

- 1 Be sure budget requests and allocations meet technology and data management needs, and manage vendor contracts to ensure the agency can perform its core mission of protecting sensitive tax and motor vehicle information.
- 1 Continuously develop, monitor and gage our privacy and security protocols and practices to ensure customer information is protected and secure.

Goal 1 Performance Measures

- Develop and continuously review services and processes to assess online completion, with the goal of providing our customers more convenient, timely and efficient ways of complying with the law, thereby having their service needs met.
- Track specific metrics to evaluate e-services and programs uses.
- Improve paperless customer service delivery methods.
- Regularly assess security permissions to ensure access to systems is restricted on a need-to-know basis, using the principle of least privilege, where only those that need access to certain systems or processes have that access to perform their job functions.
- Perform regular budget examinations, looking 18 months to 10 years into the future, to confirm that agency technology, personnel and other administrative and management budget needs have been considered, forecasted and managed.



AGENCY GOAL TWO

GOAL 2



Enhance the Customer Experience

by Fostering Relationships with Community Partners, Facilitating Effective Contacts, Increasing Customer Support Options, and Providing Greater Access to Underserved Communities.

OBJECTIVE 1

Be accessible and helpful to our customers through all forms of communication.

Strategies

- 📌 Provide direct assistance to customers by focusing on particular groups and individuals.
- 📌 Provide training and education to our customers.
- 📌 Elicit customer feedback to understand where we can improve.
- 📌 Use social media to inform and educate all customers.

OBJECTIVE 2

Guide, direct and help customers to become or remain compliant.

Strategies

- 📌 Perform reviews and checks to ensure required customer reporting and filings are timely and accurate.
- 📌 Provide customers directed guidance and communications.

OBJECTIVE 3

Timely perform all duties to ensure our customers receive useful services and information.

Strategies

- 📌 Ensure timely and accurate reports, distributions and forecasts.

OBJECTIVE 4

Develop and foster relationships with industry groups and professional organizations.

Strategies

- 📌 Conduct industry training.
- 📌 Create materials to provide education about specific programs.
- 📌 Participate in professional organizations (as appropriate).



Goal 2: Enhance the Customer Experience

—continued

OBJECTIVE 5

Ensure quality products and services.

Strategies

- 1 Perform internal quality control reviews.

Goal 2 Performance Measures

- Increase social media presence to provide customers guidance and direction on tax and motor vehicle information.
- Create and manage customer service outreach programs to provide education, ensure customers understand available e-services and self-help options, and ensure effective contacts have been made to help customers comply with applicable laws.
- Ensure statutorily required programs are timely, adequately tracked and managed.
- Regularly visit licensees to ensure adherence to license requirements and ensure their needs are addressed.
- Create programs focused on providing education and assistance to tax preparers, county assessors and other industry professionals.
- Monitor to ensure all agency processes are timely and accurately executed, including collections, distributions, refund processing, DMV branch office and dealer work, requested forecasting and other economic reports, case dispositions and appeals, license processing, property valuations and like duties, compliance and audit reports, and other direct customer contacts and processes.
- Expand and enrich our quality assurance review processes.
- Translate select forms and instructions into Spanish to better serve customers that prefer this option and offer multiple translation options on agency websites.



AGENCY GOAL THREE

GOAL 3



Promote a Quality Work Environment and Sound Agency Leadership

by Empowering Employees and Integrating Performance Management and Providing Strong Leadership and Accountable Administration.

OBJECTIVE 1

Facilitate employee professional development.

Strategies

- 1 Provide training opportunities to help employees improve their knowledge and skills, and to reduce employee stress.

OBJECTIVE 2

Develop unified performance goals and opportunities to connect, foster personal and professional growth, ensure safe and effective working conditions and continuity of services, and promote cohesiveness throughout the agency.

Strategies

- 1 Provide performance goals to all employees that help guide and direct successful professional growth and develop better customer service skills.
- 1 Ensure building and workspace safety response measures are up-to-date and satisfied.
- 1 Look for culture-building opportunities to increase camaraderie.

OBJECTIVE 3

Improve work satisfaction by encouraging fluid work schedules that best fit both agency and employee needs.

Strategies

- 1 Continuously review services and processes to assess online completion, aiming to allow more remote and flexible work options for employees.





Goal 3: Promote a Quality Work Environment and Sound Leadership

—continued

OBJECTIVE 4

Effectively manage the agency by meeting all administrative requirements.

Strategies

- 1 Timely and accurately develop, manage, create and administer necessary and required reports and documents, assessments, reviews and other projects as required by law, rule and at the request of other parties as appropriate.

Goal 3 Performance Measures

- Foster, enhance and review employee training programs (in-person, virtually, and web-based) with the goal of strengthening their professional skills and knowledge base, promoting confidence and work satisfaction, thus allowing them to better assist customers.
- Require supervisors to undergo training (at least annually) focused on effective employee management and evaluation methods, quality communication, recognizing and retaining high-performance employees, addressing poor performance, and other principles that improve organizational effectiveness.
- Manage the agency's pay-for-performance program plan, including quarterly employee written evaluations (discussing progress toward meeting expected goals, and providing guidance and direction), to help employees understand how their roles contribute to excellent customer service and fulfilling our mission by empowering employees to be successful in their professional growth.
- Ensure all agency-required mandates are fulfilled for building safety, continuity of programs, integrity of work product, and others as required, have been met.
- Continue assessing job duties and positions, taking into account new and improved innovations and changes in service delivery, for the purpose of increasing full- or part-time remote work flexibility.
- Continue looking for ways to build a culture of unity and camaraderie for the agency as a whole.
- Fulfill administrative reporting requirements as mandated by the Utah Code and administrative rules, Governor's Office, legislature, and others as required.

Fiscal Years 2025-2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
1 Enhance Customer Experience	Analyze, assess, and act upon customer service response outcome results and indicators to understand roadblocks and challenges in order to provide needed and desired services, measured in several ways including customer service feedback surveys and analysis tools by using Qualtrics products (both the website survey instrument and XM Discover), direct feedback from tax professionals, legislators, the Governor's office and other state partners, text message surveys, and other tools.	Agency: Customer Service Support Teams	Existing budget, DTS support & FAST	FY2025
2 Promoting Innovation and Leveraging Technology	Assess of high speed printers for replacement as they are at end of life.	Operations: Budget and Security team	May have a current year supplemental budget request	FY2025
3 Enhance Customer Experience	Begin developing direct to distributor program for tobacco stamp issuance and distribution.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget, DTS support & FAST	FY2025
4 Quality Work Environment/Sound Leadership	Begin relocation of Ogden DMV office to improve facilities, costs, and location.	Customer Services and Enforcement FAs: DMV Divisions	May have current year supplemental budget request, DTS support (network design) & DFCM (logistics support)	FY2025
5 Promoting Innovation and Leveraging Technology	Build online registration and filing process for special events.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2025
6 Quality Work Environment/Sound Leadership	Centralize internal agency e-training resources after reorganization to improve functional area culture and employee skills.	Customer Services FA: Training Team & Agency Website Development Team	Existing budget	FY2025
7 Enhance Customer Experience	Complete self-review projects on four unique industry groups to educate taxpayers and improve compliance.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2025
8 Enhance Customer Experience	Complete transaction time study for motor vehicle transactions to allow for better employee performance measurements and customer service improvements.	Customer Services FA: Systems Team	Existing budget, DTS support & FAST	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
9 Quality Work Environment/Sound Leadership	Conduct internal audit risk assessments to determine the level of agency risk in various areas of performance to ensure adequate internal and management controls exist; and communicate results to executive leadership and the commissioners.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2025
10 Quality Work Environment/Sound Leadership	Conduct internal audits at the request of agency leadership to investigate areas of risk; and communicate the audit results and recommendations to the commissioners and agency leadership as applicable to each audit.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2025
11 Enhance Customer Experience	Conduct RFP for e-title project vendor.	Customer Services FA: Motor Vehicle Division	May have a current year supplemental budget request, DTS support & FAST	FY2025
12 Quality Work Environment/Sound Leadership	Review contractors and implement short term rental identification and implementation program;	Tax & Revenue FA: Business Taxes and Discovery Division	Budget request may be submitted, DTS support & FAST	FY2025
13 Enhance Customer Experience	Continue enhancements to online DMV appointment scheduler based on customer feedback.	Customer Services FA: Motor Vehicle Division	Existing budget & DTS support	FY2025
14 Enhance Customer Experience	Continue to develop and deliver focused online training workshops for county elected officials, school districts, county administrators, special districts, and other taxing entities and their staff to provide education for enhanced and accurate compliance to statutory requirements.	Property & Misc. Tax FA: Subject matter experts	Existing budget	FY2025
15 Promoting Innovation and Leveraging Technology	Coordinate including tax and motor vehicle services into the Citizen Portal, including Verifiable Digital Credentials.	Agency: Systems Support Team	Existing budget & DTS support	FY2025
16 Enhance Customer Experience	Coordination between agency, DTS, and other governmental entities on data sharing agreements and legislation.	Agency: Systems Support Team	Existing budget & DTS support	FY2025
17 Quality Work Environment/Sound Leadership	Develop and amend current licence plate requirements and centrally distribute license plates	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & Tyler Technologies Utah (3rd party vendor)	FY2025
18 Enhance Customer Experience	Develop and enhance reporting tools to provide support and guidance on each county's data collection systems and processes to assist the counties in better understanding their own data and to accurately communicate that to the agency; this will allow the agency to provide better oversight.	Property & Misc. Tax FA: Property Tax Division	Existing budget	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
19 Enhance Customer Experience	Develop and implement management controls and calculations, both within tax systems and manual processes, timely to ensure complexities in distribution required by statute are accurately determined and distributed monthly on behalf of state and local jurisdictions.	Tax & Revenue FA: Financial Operations Division	Existing budget, DTS support & FAST	FY2025
20 Quality Work Environment/Sound Leadership	Develop and implement training programs for tobacco, CBD, and e-cig program staff.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2025
21 Promoting Innovation and Leveraging Technology	Develop and maintain electronic licensing program and options for both dealer and sales representative licensees to allow downloads, apply for and renew online licenses, this will include management of the inspection process necessary for new licensees.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget, DTS support & FAST	FY2025
22 Quality Work Environment/Sound Leadership	Develop and update retention schedule, including update record series and identify personal identifiable information in each series for privacy program management; develop and roll-out privacy program.	Operations: Records and Privacy Team	Existing budget & DTS support	FY2025
23 Enhance Customer Experience	Develop communication tool to educate customers (both employers and their employees) on withholding reporting requirements.	Tax & Revenue FA: Income Tax and Education Division	Existing budget, DTS support & FAST	FY2025
24 Enhance Customer Experience	Develop fee calculator to enable customers to understand all fees associated with the a customers' purchase and registration of a vehicles.	Customer Services FA: Motor Vehicle Division	Existing budget & DTS support	FY2025
25 Promoting Innovation and Leveraging Technology	Develop new tax type for reporting, enforcing, and collecting under the Cannabinoid Licensing and Tax Act.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2025
26 Enhance Customer Experience	Develop of Electronic Cigarette Product Registry.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2025
27 Quality Work Environment/Sound Leadership	Develop policies and procedures for new requirements for the cigarette, CBD, and tobacco programs.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2025
28 Promoting Innovation and Leveraging Technology	Develop process replacing paper business and tax registration form (TC-69) with e-form through Taxpayer Access Point Business Registration (TAP-BR).	Tax & Revenue FA: Financial Operations Division	Existing budget, DTS support & FAST	FY2025
29 Enhance Customer Experience	Develop program for the enforcement of the collection of tax on the sales of CBD products	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget, DTS support & FAST	FY2025
30 Quality Work Environment/Sound Leadership	Develop, design, and create a single motor vehicle registration decal, displaying both month and year.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & Tyler Technologies Utah (3rd party vendor)	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
31 Enhance Customer Experience	Develop, enhance, and conduct training courses (both on-site and in the field) to provide education to agency and county personnel to equip them with the necessary knowledge and skills to achieve licensed appraiser status and certification for Utah. The training also provides continuing education (CE) credits, helping attendees maintain their licenses and skill levels.	Property & Misc. Tax FA: Property Tax and Centrally Assessed Divisions	Existing budget	FY2025
32 Enhance Customer Experience	Develop, generate, review and submit to the legislature as required by law, the results of increased enforcement of the Electronic Cigarette and Nicotine Product Licensing and Taxation Act.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2025
33 Enhance Customer Experience	Develop, review and submit to the legislature the Electronic Cigarette Product Registry Report.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2025
34 Quality Work Environment/Sound Leadership	Develop, test, and put into production tax and motor vehicle systems adjustments from bills passed during previous and current fiscal year general legislative session: 51 bills in total ranging from GS 2020 - GS 2024.	Agency: Systems Support Team	May have a current year supplemental budget request, DTS support & FAST as applicable according to the law	FY2025
35 Enhance Customer Experience	Enforce tobacco master settlement agreement by performing field audits and site inspections and reviewing for adherence to escrow payments from the non-participating cigarette manufacturers to ensure payments are being placed in the escrow account as required under the agreement.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2025
36 Enhance Customer Experience	Enhance DMV office signage for improvements based on customer feedback.	Customer Services FA: Motor Vehicle Division	Existing budget & DFCM	FY2025
37 Enhance Customer Experience	Enhance MVP renewal information link to provide more transparency and a detail fee breakdown for registration renewal of existing vehicles.	Customer Services FA: Motor Vehicle Division	Existing budget & DTS support	FY2025
38 Enhance Customer Experience	Ensure sales tax compliance on: 1) motor vehicle purchases, 2) aircraft purchases, and 3) foreign purchases (as identified through Customs reports).	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2025
39 Promoting Innovation and Leveraging Technology	Evaluate agency's TIME (tolerate, invest, migrate, and eliminate) and SAFe (scaled agile framework) systems with DTS.	Agency: Executive Leadership Team	Existing budget & DTS support	FY2025
40 Enhance Customer Experience	Finalize garage project in DMV (VADRS) system allowing customer accounts to manage all vehicles together.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
41 Quality Work Environment/Sound Leadership	Finalize Pay for Performance plan year, assess where all evaluations are rated for the year to be able to allocate the funds based on success level throughout the agency, perform calculations and employee increases and allocations, ensure accurate results, and submit to DHRM.	Operations: Budget Team	Existing budget	FY2025
42 Promoting Innovation and Leveraging Technology	Improve and expand data collection and analysis capabilities which will allow the agency to provide improved assessments for better tax rate certification. This impacts both centrally and locally assessed properties, as evidenced through property assessments and statistical reports the agency provides to the Governor's Office, legislature, and others as required.	Property & Misc. Tax FA: All divisions	Existing budget & DTS support may be needed	FY2025
43 Enhance Customer Experience	Integration of QR codes in tax collection notices for payment accuracy and promote the ability for customers to create self-service payment agreements	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2025
44 Promoting Innovation and Leveraging Technology	Maintain and update Certified Tax Rate system.	Property & Misc Tax FA: Systems group	Existing budget	FY2025
45 Enhance Customer Experience	Maintain Renewal Express, On-the-Spot (OTS), Vehicle Title Lien and Registration (TLR) programs.	Customer Services FA: Systems Team	Existing budget, DTS support & Tyler Technologies Utah (3rd party vendor)	FY2025
46 Promoting Innovation and Leveraging Technology	Maintain T-CAP and ongoing Salesforce licenses.	Commission: Staff as needed	Existing budget & DTS support	FY2025
47 Promoting Innovation and Leveraging Technology	Manage and develop active tax and motor vehicle public website system interfaces.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2025
48 Enhance Customer Experience	Manage and develop websites, including changes, improvements, corrections, and other postings.	Operations: Web Development Team	Existing budget	FY2025
49 Enhance Customer Experience	Manage and track dealer license plate inventory orders to ensure all requirements under law are satisfied and appropriate, review and audit dealer plate sales for compliance, provide training to dealers and law enforcement on statutory requirements.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2025
50 Enhance Customer Experience	Modify existing PACT ACT report to require electronic filing of cigarette and electronic cigarette products.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2025
51 Quality Work Environment/Sound Leadership	Participate in and conduct Peace Officer Standards Training (POST) for officer recertification.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
52 Enhance Customer Experience	Participate in national motor vehicle enforcement organizations to track trends regarding illegal motor vehicle activity (fraud and theft practices), improve our inspection process, and gather and participate in other industry enhancements and officer safety.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2025
53 Enhance Customer Experience	Perform all necessary types of vehicle identification number (VIN), dealership lot, body shop, state impound yard tow, crushers and dismantler, and dealer-sale files inspections.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2025
54 Quality Work Environment/Sound Leadership	Perform annual Incident Response & COOP tabletop exercise.	Operations: Emergency Preparedness Team	Existing budget	FY2025
55 Enhance Customer Experience	Perform revenue duties, including providing fiscal impact responses as requested by the legislature, provide economic indicator and state revenue forecasts; update data reports monthly, quarterly, and annually as needed; assist with legislative implementation; respond to data and analysis requests from the legislature, governor's office, and other entities; complete special projects as assigned by the commissioners; and serve as hearing officers and provide expert consultation and testimony in district court property tax cases for centrally assessed properties, as requested.	Commission: Economic and Statistical Unit	Existing budget	FY2025
56 Enhance Customer Experience	Perform sales tax check ups with customers to help them establish a process to ensure they satisfy filing and record requirements for correct tax reporting with the intent of reducing future errors.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2025
57 Enhance Customer Experience	Perform traffic stops and other necessary duties to enforce registration law requirements for vehicles safety/emission, auto theft, and tax collection purposes.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2025
58 Quality Work Environment/Sound Leadership	Prepare and submit annual budget, including compensation, technology, building, and other needs.	Operations: Budget Team	May have a current year supplemental budget request	FY2025
59 Quality Work Environment/Sound Leadership	Prepare Department Operations report.	Operations: Budget Team and Agency Leadership	Existing budget	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
60 Enhance Customer Experience	Process petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; provide administrative support for administrative appeals hearings and related mediation and status conferences; provide administrative support for commission meetings; prepare documents for the commissioners and administrative law judges; and perform other administrative and clerical duties, as requested.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2025
61 Enhance Customer Experience	Process tax returns and refunds timely while maintaining quality processing standards.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2025
62 Quality Work Environment/Sound Leadership	Project focusing on an in-depth review of accounts receivable to improve processes for increasing delinquent tax collections	Customer Services FA: Collections Division	Existing budget	FY2025
63 Quality Work Environment/Sound Leadership	Provide guidance to staff based on established goals, track progress and adjust strategies as needed for growth and collaboration.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2025
64 Enhance Customer Experience	Provide joint division efforts to better educate and inform customers by using website how-to guides and videos, publishing monthly webinars, developing and holding Tax Roadshows throughout the state, promoting the practitioner hotline, and other methods.	Tax & Revenue FA: Income Tax and Education & Business Taxes and Discovery Divisions	Existing budget	FY2025
65 Quality Work Environment/Sound Leadership	Provide joint sales tax motor vehicle training to improve employee skills and knowledge on motor vehicle sales tax issues.	Customer Services FA: Training Team	Existing budget	FY2025
66 Promoting Innovation and Leveraging Technology	Provide support on the transition to DTS' new identify and access management solutions.	Agency: Systems Support Team	Existing budget & DTS support	FY2025
67 Enhance Customer Experience	Qualtrics XM Discover contract costs to cover FY2025 expenditure (one-time funding request)	Operations: Budget Team	Will have a current year supplemental budget request	FY2025
68 Enhance Customer Experience	Receive petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; hold formal administrative appeals hearings and related mediation and status conferences consistent with Utah Administrative Procedures Act, Utah Tax Code, Utah Motor Vehicle statutes and applicable Utah Administrative Rules; draft, deliberate and issue resulting Commission orders.	Commission: Commissioners and Appeals Staff	Existing budget	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
69 Enhance Customer Experience	Receive private letter ruling (PLR) requests based on fact specific situations, which are not under appeal; perform administrative law judge researches and analyze statutes and administrative rules to interpret the law and provide guidance to the taxpayer regarding the applicability of the law to the taxpayer's specific situation; communicate the analysis with divisions and other interested parties as necessary; perform a full commission review; and submit final PLR to taxpayer.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2025
70 Promoting Innovation and Leveraging Technology	Replace, upgrade, and test new credit card readers.	Operations: Security Team	Existing budget & DTS support	FY2025
71 Enhance Customer Experience	Research topics and issues that are lacking in the statewide property tax valuation community, including both centrally and locally assessed property. Prepare and provide presentations for the three day Assessor School Training that is statutorily required by the agency to sponsor, attended by elected county officials, county office staff, agency staff and commissioners, county contractors, and legislators.	Property & Misc. Tax FA: All divisions as needed by topic	Existing budget	FY2025
72 Quality Work Environment/Sound Leadership	Respond to 2022 IRS Onsite Safeguard Review findings using the corrective action plan.	Operations: Security and Disclosure Team	Existing budget	FY2025
73 Quality Work Environment/Sound Leadership	Review and discuss long-term legislative planning items for proposal to the legislature.	Operations: Policy, Planning and Public Affairs Team	Existing budget	FY2025
74 Quality Work Environment/Sound Leadership	Review and respond to 2025 general legislative session bills: number of bills will be updated after the legislative session.	Agency: Legislative Response Team	Existing budget & DTS support	FY2025
75 Quality Work Environment/Sound Leadership	Review performance measures for adjustment as needed; report on previous years' measures.	Operations: Budget Team	Existing budget	FY2025
76 Promoting Innovation and Leveraging Technology	Review program return edits to determine if manual intervention is needed.	Tax & Revenue FA: Financial Operations and Income Tax and Education Divisions	Existing budget	FY2025
77 Enhance Customer Experience	Rework defaulted payment agreement process to reduce number of defaults and improve customer compliance.	Customer Services FA: Collections Division	Existing budget, DTS support & FAST	FY2025
78 Promoting Innovation and Leveraging Technology	Rework online payment agreements to enhance usability and increase customer self-service.	Customer Services FA: Collections Division	Existing budget, DTS support & FAST	FY2025

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
79 Quality Work Environment/Sound Leadership	Update Annual Report and Strategic Plan.	Operations: Reporting	Existing budget	FY2025
80 Promoting Innovation and Leveraging Technology	Upgrade Genesys contact center software, including moving to cloud services and license-type changes to PCIPal.	Operations: Security Team	Will have current year supplemental budget request and ongoing request for future years, DTS support & State Finance for PCIPal	FY2025
81 Promoting Innovation and Leveraging Technology	Upgrade tax (GenTax) and motor vehicle (VADRS) CORE systems - this project will span from September 2024 to December 2025.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2025
82 Promoting Innovation and Leveraging Technology	Windows 11 update, including deployment and update of capable computers as needed in the agency.	Operations: Budget Team	Existing budget & DTS support	FY2025
1 Enhance Customer Experience	Analyze, assess, and act upon customer service response outcome results and indicators to understand roadblocks and challenges in order to provide needed and desired services, measured in several ways including customer service feedback surveys and analysis tools by using Qualtrics products (both the website survey instrument and XM Discover), direct feedback from tax professionals, legislators, the Governor's office and other state partners, text message surveys, and other tools.	Agency: Customer Service Support Teams	Existing budget, DTS support & FAST	FY2026
2 Enhance Customer Experience	Build online portal in the Taxpayer Access Point (TAP) to submit Voluntary Disclosure Agreements requests and enhance them in the tax system (GenTax) to make it more efficient and user-friendly.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2026
3 Promoting Innovation and Leveraging Technology	Build opt-in program for text/email tax refund status updates.	Tax & Revenue FA: Income Tax and Education Division	Budget request may be submitted, DTS support & FAST	FY2026
4 Enhance Customer Experience	Complete development of self-serve process through TAP to allow customer the ability access pertinent information from their accounts, including applicable changes in the law, filing deadlines/requirements, confirmations of return receipt and refund status, and other needs based on customer feedback.	Tax & Revenue FA: Income Tax and Education Division		FY2026
5 Enhance Customer Experience	Complete self-review projects on four unique industry groups to educate taxpayers and improve compliance.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2026
6 Quality Work Environment/Sound Leadership	Conduct internal audit risk assessments to determine the level of agency risk in various areas of performance to ensure adequate internal and management controls exist; and communicate results to executive leadership and the commissioners.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2026

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
7 Quality Work Environment/Sound Leadership	Conduct internal audits at the request of agency leadership to investigate areas of risk; and communicate the audit results and recommendations to the commissioners and agency leadership as applicable to each audit.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2026
8 Quality Work Environment/Sound Leadership	Continue process to relocate Ogden DMV office to improve facilities, costs, and location.	Customer Services and Enforcement FAs: DMV Divisions	Requesting one-time and ongoing budget to either purchase or lease a DMV building plus relocation expenses	FY2026
9 Enhance Customer Experience	Continue to develop and deliver focused online training workshops for county elected officials, school districts, county administrators, special districts, and other taxing entities and their staff to provide education for enhanced and accurate compliance to statutory requirements.	Property & Misc. Tax FA: Subject matter experts	Existing budget	FY2026
10 Promoting Innovation and Leveraging Technology	Continue to provide support on the transition to DTS' new identify and access management solutions.	Agency: Systems Support Team	Existing budget & DTS support	FY2026
11 Enhance Customer Experience	Coordination between agency, DTS, and other governmental entities on data sharing agreements and legislation.	Agency: Systems Support Team	Existing budget & DTS support	FY2026
12 Promoting Innovation and Leveraging Technology	Develop Accredited Standard Committee X9 levy standard with financial institutions to allow a paperless process as is being done in other FAST states, greatly improving the process.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2026
13 Enhance Customer Experience	Develop and implement management controls and calculations, both within tax systems and manual processes, timely to ensure complexities in revenue distribution required by statute are accurately determined and distributed monthly on behalf of state and local jurisdictions.	Tax & Revenue FA: Financial Operations Division	Existing budget, DTS support & FAST	FY2026
14 Enhance Customer Experience	Develop and implement online title and registration options for motor vehicle dealers.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget, DTS support & FAST	FY2026
15 Enhance Customer Experience	Develop customer self-review program for improved compliance with tobacco, e-cig and CBD laws.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget, DTS support & FAST	FY2026
16 Promoting Innovation and Leveraging Technology	Develop e-submission of religious and charitable sales tax refund requests (TC-62N) into Taxpayer Access Point (TAP).	Tax & Revenue FA: Income Tax and Education Division	Existing budget, DTS support & FAST	FY2026
17 Promoting Innovation and Leveraging Technology	Develop file transfer with payroll companies for garnishments.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2026
18 Promoting Innovation and Leveraging Technology	Develop online impound vehicle disposition program for improved processes.	Enforcement FA: Motor Vehicle Division - Title & Dealer Services	Budget request may be submitted from a restricted account, DTS support & FAST	FY2026

Strategic Plan Goal		Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
19	Promoting Innovation and Leveraging Technology	Develop process for e-title project for dealers.	Customer Services FA: Motor Vehicle Division	Budget request may be submitted, DTS support & FAST	FY2026
20	Promoting Innovation and Leveraging Technology	Develop process to allow echeck payments from Quickbooks into Taxpayer Access Point (TAP).	Tax & Revenue FA: Income Tax and Education Division	Existing budget, DTS support & FAST	FY2026
21	Promoting Innovation and Leveraging Technology	Develop system to communicate location of impounded vehicles with Insurite and other necessary parties' systems and determine actions necessary to process the vehicles out of impound.	Enforcement FA: Motor Vehicle Division - Title & Dealer Services	Existing budget, DTS support, FAST & 3rd party vendors as necessary	FY2026
22	Enhance Customer Experience	Develop, enhance, and conduct training courses (both on-site and in the field) to provide education to agency and county personnel to equip them with the necessary knowledge and skills to achieve licensed appraiser status and certification for Utah. The training also provides continuing education (CE) credits, helping attendees maintain their licenses and skill levels.	Property & Misc. Tax FA: Property Tax and Centrally Assessed Divisions	Existing budget	FY2026
23	Quality Work Environment/Sound Leadership	Develop, test, and put into production tax and motor vehicle systems adjustments from bills passed during previous and current fiscal year general legislative session: number of bills and will be updated annually - GS 2025.	Agency: Systems Support Team	Future budget or current year supplemental may be requested, DTS support & FAST as applicable according to the law	FY2026
24	Enhance Customer Experience	Enforce the collection of tax on the sales of CBD products, including field audits and collaborating with the Department of Agriculture and Food.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2026
25	Enhance Customer Experience	Enforce tobacco master settlement agreement by performing field audits and site inspections and reviewing for adherence to escrow payments from the non-participating cigarette manufacturers to ensure payments are being placed in the escrow account as required under the agreement.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2026
26	Promoting Innovation and Leveraging Technology	Enhance process for online renewals to allow more motor vehicle types.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2026
27	Promoting Innovation and Leveraging Technology	Enhance process to notify customers of sold vehicle.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2026
28	Enhance Customer Experience	Enhance reporting tools to provide support and guidance on each county's data collection systems and processes to assist the counties in better understanding their own data and to accurately communicate that to the agency; this will allow the agency to provide better oversight.	Property & Misc. Tax FA: Property Tax Division	Existing Budget	FY2026
29	Enhance Customer Experience	Ensure sales tax compliance on: 1) motor vehicle purchases, 2) aircraft purchases, and 3) foreign purchases (as identified through Customs reports).	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2026

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
30 Promoting Innovation and Leveraging Technology	Evaluate agency's TIME (tolerate, invest, migrate, and eliminate) and SAFE (scaled agile framework) systems with DTS.	Agency: Executive Leadership Team	Existing budget & DTS support	FY2026
31 Promoting Innovation and Leveraging Technology	Evaluate the possible use of PC as a Service program and our ability to use the program differently throughout the agency or by program.	Operations: Budget Team	Existing budget	FY2026
32 Enhance Customer Experience	Finalize development and implementation of direct to distributor program for tobacco stamp issuance and distribution.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget, DTS support & FAST	FY2026
33 Quality Work Environment/Sound Leadership	Finalize Pay for Performance plan year, assess where all evaluations are rated for the year to be able to allocate the funds based on success level throughout the agency, perform calculations and employee increases and allocations, ensure accurate results, and submit to DHRM.	Operations: Budget Team	Existing budget	FY2026
34 Enhance Customer Experience	Generate, review and submit to the legislature as required by law to show the results of increased enforcement of the Electronic Cigarette and Nicotine Product Licensing and Taxation Act.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2026
35 Enhance Customer Experience	Generate, review, and submit the Electronic Cigarette Product Registry Report to the legislature as required by law.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2026
36 Promoting Innovation and Leveraging Technology	Implement Third Party Payment (TPP) process with Chapter 13 bankruptcy trustee.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2026
37 Promoting Innovation and Leveraging Technology	Improve and expand data collection and analysis capabilities which will allow the agency to provide improved assessments for better tax rate certification. This impacts both centrally and locally assessed properties, as evidenced through property assessments and statistical reports the agency provides to the Governor's Office, legislature, and others as required.	Property & Misc. Tax FA: All divisions	Existing budget & DTS support may be needed	FY2026
38 Quality Work Environment/Sound Leadership	Maintain and conduct training programs for tobacco, CBD, and e-cig program staff.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2026
39 Promoting Innovation and Leveraging Technology	Maintain and update Certified Tax Rate system.	Property & Misc Tax FA: Systems group	Existing budget	FY2026
40 Enhance Customer Experience	Maintain Electronic Cigarette Product Registry.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2026

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
41 Promoting Innovation and Leveraging Technology	Maintain electronic licensing program and options for both dealer and sales representative licensees to allow downloads, apply for and renew online licenses, this will include management of the inspection process necessary for new licensees.	Enforcement FA: Motor Vehicle Enforcement Division	Budget request may be submitted from a restricted account, DTS support & FAST	FY2026
42 Enhance Customer Experience	Maintain Renewal Express, On-the-Spot (OTS), Vehicle Title Lien and Registration (TLR) programs.	Customer Services FA: Systems Team	Existing budget, DTS support & Tyler Technologies Utah (3rd party vendor)	FY2026
43 Promoting Innovation and Leveraging Technology	Maintain T-CAP and ongoing Salesforce licenses.	Commission: Staff as needed	Existing budget & DTS support	FY2026
44 Promoting Innovation and Leveraging Technology	Manage and develop active tax and motor vehicle public website system interfaces.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2026
45 Enhance Customer Experience	Manage and develop websites, including changes, improvements, corrections, and other postings.	Operations: Web Development Team	Existing budget	FY2026
46 Enhance Customer Experience	Manage and track dealer license plate inventory orders to ensure all requirements under law are satisfied and appropriate, review and audit dealer plate sales for compliance, provide training to dealers and law enforcement on statutory requirements.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2026
47 Quality Work Environment/Sound Leadership	Manage retention schedule, including review and update record series as needed and identify personal identifiable information in each series for privacy program management; respond to privacy requests as needed.	Operations: Records and Privacy Team	Existing budget	FY2026
48 Quality Work Environment/Sound Leadership	Participate in and conduct Peace Officer Standards Training (POST) for officer recertification.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2026
49 Quality Work Environment/Sound Leadership	Participate in IRS Onsite Safeguard Review (September 2025, every 3 years).	Operations: Security and Disclosure Team	Existing budget	FY2026
50 Enhance Customer Experience	Participate in national motor vehicle enforcement organizations to track trends regarding illegal motor vehicle activity (fraud and theft practices), improve our inspection process, and gather and participate in other industry enhancements and officer safety.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2026
51 Enhance Customer Experience	Perform all necessary types of vehicle identification number (VIN), dealership lot, body shop, state impound yard tow, crushers and dismantler, and dealer-sale files inspections.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2026
52 Quality Work Environment/Sound Leadership	Perform annual Incident Response & COOP tabletop exercise.	Operations: Emergency Preparedness Team	Existing budget	FY2026

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
53 Enhance Customer Experience	Perform revenue duties, including providing fiscal impact responses as requested by the legislature, provide economic indicator and state revenue forecasts; update data reports monthly, quarterly, and annually as needed; assist with legislative implementation; respond to data and analysis requests from the legislature, governor's office, and other entities; complete special projects as assigned by the commissioners; and serve as hearing officers and provide expert consultation and testimony in district court property tax cases for centrally assessed properties, as requested.	Commission: Economic and Statistical Unit	Existing budget	FY2026
54 Enhance Customer Experience	Perform sales tax check ups with customers to help them establish a process to ensure they satisfy filing and record requirements for correct tax reporting with the intent of reducing future errors.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2026
55 Enhance Customer Experience	Perform traffic stops and other necessary duties to enforce registration law requirements for vehicles safety/emission, auto theft, and tax collection purposes.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2026
56 Quality Work Environment/Sound Leadership	Prepare and submit annual budget, including compensation, technology, building, and other needs.	Operations: Budget Team	Budget request will be submitted	FY2026
57 Quality Work Environment/Sound Leadership	Prepare Department Operations report.	Operations: Budget Team and Agency Leadership	Existing budget	FY2026
58 Enhance Customer Experience	Process petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; provide administrative support for administrative appeals hearings and related mediation and status conferences; provide administrative support for commission meetings; prepare documents for the commissioners and administrative law judges; and perform other administrative and clerical duties, as requested.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2026
59 Enhance Customer Experience	Process tax returns and refunds timely while maintaining quality processing standards.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2026
60 Quality Work Environment/Sound Leadership	Provide guidance to staff based on established goals, track progress and adjust strategies as needed for growth and collaboration.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2026

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
61 Enhance Customer Experience	Provide joint division efforts to better educate and inform customers by using website how-to guides and videos, publishing monthly webinars, developing and holding Tax Roadshows throughout the state, promoting the practitioner hotline, and other methods.	Tax & Revenue FA: Income Tax and Education & Business Taxes and Discovery Divisions	Existing budget	FY2026
62 Promoting Innovation and Leveraging Technology	Provide support on the transition to DHRM's human capital management solution for Tax Commission employees.	Agency: Systems Support Team	Existing budget & DTS support	FY2026
63 Enhance Customer Experience	Qualtrics XM Discover contract costs (on-going funding request)	Operations: Budget Team	Budget request will be submitted	FY2026
64 Enhance Customer Experience	Receive petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; hold formal administrative appeals hearings and related mediation and status conferences consistent with Utah Administrative Procedures Act, Utah Tax Code, Utah Motor Vehicle statutes and applicable Utah Administrative Rules; draft, deliberate and issue resulting Commission orders.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2026
65 Enhance Customer Experience	Receive private letter ruling (PLR) requests based on fact specific situations, which are not under appeal; perform administrative law judge researches and analyze statutes and administrative rules to interpret the law and provide guidance to the taxpayer regarding the applicability of the law to the taxpayer's specific situation; communicate the analysis with divisions and other interested parties as necessary; perform a full commission review; and submit final PLR to taxpayer.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2026
66 Quality Work Environment/Sound Leadership	Renewal of maintenance and support agreement for FAST products (Utah's tax and motor vehicle systems).	Operations: Budget Team	Budget request will be submitted	FY2026
67 Promoting Innovation and Leveraging Technology	Research possible alternative solutions for processing paper checks.	Operations: Security Team	Budget request may be submitted, DTS support & FAST	FY2026
68 Enhance Customer Experience	Research topics and issues that are lacking in the statewide property tax valuation community, including both centrally and locally assessed property. Prepare and provide presentations for the three day Assessor School Training that is statutorily required by the agency to sponsor, attended by elected county officials, county office staff, agency staff and commissioners, county contractors, and legislators.	Property & Misc. Tax FA: All divisions as needed by topic	Existing budget	FY2026

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
69 Quality Work Environment/Sound Leadership	Review and discuss long-term legislative planning items for proposal to the legislature.	Operations: Policy, Planning and Public Affairs Team	Existing budget	FY2026
70 Quality Work Environment/Sound Leadership	Review and respond to 2026 general legislative session bills: number of bills will be updated after the legislative session.	Operations: Agency Legislative Response Team	Existing budget & DTS support	FY2026
71 Quality Work Environment/Sound Leadership	Review performance measures for adjustment as needed; report on previous years' measures.	Operations: Budget Team	Existing budget	FY2026
72 Promoting Innovation and Leveraging Technology	Review program return edits to determine if manual intervention is needed.	Tax & Revenue FA: Financial Operations and Income Tax and Education Divisions	Existing budget	FY2026
73 Quality Work Environment/Sound Leadership	Review withholding filing process and penalty assessment dates to enhance customer compliance.	Customer Services FA: Leadership	Existing budget	FY2026
74 Quality Work Environment/Sound Leadership	Update Annual Report and Strategic Plan.	Operations: Reporting	Existing budget	FY2026
75 Promoting Innovation and Leveraging Technology	Upgrade tax (GenTax) and motor vehicle (VADRS) CORE systems - this project will span from September 2024 to December 2025.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2026
76 Promoting Innovation and Leveraging Technology	Google Analytics 360 Software used to get insights into how customers are using our websites.	Agency: Systems Support Team	May have a current year supplemental budget request	FY2026
1 Enhance Customer Experience	Analyze, assess, and act upon customer service response outcome results and indicators to understand roadblocks and challenges in order to provide needed and desired services, measured in several ways including customer service feedback surveys and analysis tools by using Qualtrics products (both the website survey instrument and XM Discover), direct feedback from tax professionals, legislators, the Governor's office and other state partners, text message surveys, and other tools.	Agency: Customer Service Support Teams	Existing budget, DTS support & FAST	FY2027
2 Promoting Innovation and Leveraging Technology	Build intrastate fleet renewal process in the motor vehicle portal (MVP).	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2027
3 Enhance Customer Experience	Complete self-review projects on four unique industry groups to educate taxpayers and improve compliance.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
4 Quality Work Environment/Sound Leadership	Conduct internal audit risk assessments to determine the level of agency risk in various areas of performance to ensure adequate internal and management controls exist; and communicate results to executive leadership and the commissioners.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2027
5 Quality Work Environment/Sound Leadership	Conduct internal audits at the request of agency leadership to investigate areas of risk; and communicate the audit results and recommendations to the commissioners and agency leadership as applicable to each audit.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2027
6 Enhance Customer Experience	Continue to develop (as needed) and adjust self-serve process through TAP to allow customer the ability access pertinent information from their accounts, including applicable changes in the law, filing deadlines/requirements, confirmations of return receipt and refund status, and other needs based on customer feedback.	Tax & Revenue FA: Income Tax and Education Division	Existing budget, DTS support & FAST	FY2027
7 Enhance Customer Experience	Continue to develop and deliver focused online training workshops for county elected officials, school districts, county administrators, special districts, and other taxing entities and their staff to provide education for enhanced and accurate compliance to statutory requirements.	Property & Misc. Tax FA: Subject matter experts	Existing budget	FY2027
8 Enhance Customer Experience	Coordination between agency, DTS, and other governmental entities on data sharing agreements and legislation.	Agency: Systems Support Team	Existing budget & DTS support	FY2027
9 Promoting Innovation and Leveraging Technology	Develop Accredited Standard Committee X9 levy standard with third party processors to allow a paperless process as is being done in other FAST states, greatly improving the process.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2027
10 Enhance Customer Experience	Develop and implement management controls and calculations, both within tax systems and manual processes, timely to ensure complexities in revenue distribution required by statute are accurately determined and distributed monthly on behalf of state and local jurisdictions.	Tax & Revenue FA: Financial Operations Division	Existing budget, DTS support & FAST	FY2027
11 Promoting Innovation and Leveraging Technology	Develop process for e-title project for individuals.	Customer Services FA: Motor Vehicle Division	Budget request may be submitted, DTS support & FAST	FY2027
12 Promoting Innovation and Leveraging Technology	Develop process to automate tax payments through electronic fund transfer (EFT) automated clearing house (ACH) credit (TC-86) integrate into TAP.	Tax & Revenue FA: Financial Operations Division	Existing budget, DTS support & FAST	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
13 Enhance Customer Experience	Develop, enhance, and conduct training courses (both on-site and in the field) to provide education to agency and county personnel to equip them with the necessary knowledge and skills to achieve licensed appraiser status and certification for Utah. The training also provides continuing education (CE) credits, helping attendees maintain their licenses and skill levels.	Property & Misc. Tax FA: Property Tax and Centrally Assessed Divisions	Existing budget	FY2027
14 Quality Work Environment/Sound Leadership	Develop, test, and put into production tax and motor vehicle systems adjustments from bills passed during previous and current fiscal year general legislative session: number of bills will be updated annually - GS 2026.	Agency: Systems Support Team	Future budget or current year supplemental may be requested, DTS support & FAST as applicable according to the law	FY2027
15 Enhance Customer Experience	Enforce the collection of tax on the sales of CBD products, including field audits and collaborating with the Department of Agriculture and Food.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2027
16 Enhance Customer Experience	Enforce tobacco master settlement agreement by performing field audits and site inspections and reviewing for adherence to escrow payments from the non-participating cigarette manufacturers to ensure payments are being placed in the escrow account as required under the agreement.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2027
17 Enhance Customer Experience	Enhance reporting tools to provide support and guidance on each county's data collection systems and processes to assist the counties in better understanding their own data and to accurately communicate that to the agency; this will allow the agency to provide better oversight.	Property & Misc. Tax FA: Property Tax Division	Existing budget	FY2027
18 Enhance Customer Experience	Ensure sales tax compliance on: 1) motor vehicle purchases, 2) aircraft purchases, and 3) foreign purchases (as identified through Customs reports).	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2027
19 Promoting Innovation and Leveraging Technology	Evaluate agency's TIME (tolerate, invest, migrate, and eliminate) and SAFe (scaled agile framework) systems with DTS.	Agency: Executive Leadership Team	Existing budget & DTS support	FY2027
20 Quality Work Environment/Sound Leadership	Finalize Pay for Performance plan year, assess where all evaluations are rated for the year to be able to allocate the funds based on success level throughout the agency, perform calculations and employee increases and allocations, ensure accurate results, and submit to DHRM.	Operations: Budget Team	Existing budget	FY2027
21 Enhance Customer Experience	Generate, review and submit to the legislature as required by law to show the results of increased enforcement of the Electronic Cigarette and Nicotine Product Licensing and Taxation Act.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
22 Enhance Customer Experience	Generate, review, and submit the Electronic Cigarette Product Registry Report to the legislature as required by law.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2027
23 Promoting Innovation and Leveraging Technology	Improve and expand data collection and analysis capabilities which will allow the agency to provide improved assessments for better tax rate certification. This impacts both centrally and locally assessed properties, as evidenced through property assessments and statistical reports the agency provides to the Governor's Office, legislature, and others as required.	Property & Misc. Tax FA: All divisions	Existing budget & DTS support may be needed	FY2027
24 Enhance Customer Experience	Innovate and streamline customer visits, guiding them to pre-complete forms and utilizing kiosks for customer check-in.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2027
25 Quality Work Environment/Sound Leadership	Maintain and conduct training programs for tobacco, CBD, and e-cig program staff.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2027
26 Promoting Innovation and Leveraging Technology	Maintain and update Certified Tax Rate system.	Property & Misc Tax FA: Systems group	Existing budget	FY2027
27 Enhance Customer Experience	Maintain Electronic Cigarette Product Registry.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2027
28 Promoting Innovation and Leveraging Technology	Maintain electronic licensing program and options for both dealer and sales representative licensees to allow downloads, apply for and renew online licenses, this will include management of the inspection process necessary for new licensees.	Enforcement FA: Motor Vehicle Enforcement Division	Budget request may be submitted from a restricted account, DTS support & FAST	FY2027
29 Enhance Customer Experience	Maintain Renewal Express, On-the-Spot (OTS), Vehicle Title Lien and Registration (TLR) programs.	Customer Services FA: Systems Team	Existing budget, DTS support & Tyler Technologies Utah (3rd party vendor)	FY2027
30 Promoting Innovation and Leveraging Technology	Maintain system to communicate location of impounded vehicles with Insurite and other necessary parties' systems and determine actions necessary to process the vehicles out of impound.	Enforcement FA: Motor Vehicle Division - Title & Dealer Services	Existing budget, DTS support, FAST & 3rd party vendors as necessary	FY2027
31 Promoting Innovation and Leveraging Technology	Maintain T-CAP and ongoing Salesforce licenses.	Commission: Staff as needed	Existing budget & DTS support	FY2027
32 Promoting Innovation and Leveraging Technology	Manage and develop active tax and motor vehicle public website system interfaces.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2027
33 Enhance Customer Experience	Manage and develop websites, including changes, improvements, corrections, and other postings.	Operations: Web Development Team	Existing budget	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
34 Enhance Customer Experience	Manage and track dealer license plate inventory orders to ensure all requirements under law are satisfied and appropriate, review and audit dealer plate sales for compliance, provide training to dealers and law enforcement on statutory requirements.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2027
35 Quality Work Environment/Sound Leadership	Manage retention schedule, including review and update record series as needed and identify personal identifiable information in each series for privacy program management; respond to privacy requests as needed.	Operations: Records and Privacy Team	Existing budget	FY2027
36 Quality Work Environment/Sound Leadership	Participate in and conduct Peace Officer Standards Training (POST) for officer recertification.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2027
37 Enhance Customer Experience	Participate in national motor vehicle enforcement organizations to track trends regarding illegal motor vehicle activity (fraud and theft practices), improve our inspection process, and gather and participate in other industry enhancements and officer safety.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2027
38 Enhance Customer Experience	Perform all necessary types of vehicle identification number (VIN), dealership lot, body shop, state impound yard tow, crushers and dismantler, and dealer-sale files inspections.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2027
39 Quality Work Environment/Sound Leadership	Perform annual Incident Response & COOP tabletop exercise.	Operations: Emergency Preparedness Team	Existing budget	FY2027
40 Enhance Customer Experience	Perform revenue duties, including providing fiscal impact responses as requested by the legislature, provide economic indicator and state revenue forecasts; update data reports monthly, quarterly, and annually as needed; assist with legislative implementation; respond to data and analysis requests from the legislature, governor's office, and other entities; complete special projects as assigned by the commissioners; and serve as hearing officers and provide expert consultation and testimony in district court property tax cases for centrally assessed properties, as requested.	Commission: Economic and Statistical Unit	Existing budget	FY2027
41 Enhance Customer Experience	Perform sales tax check ups with customers to help them establish a process to ensure they satisfy filing and record requirements for correct tax reporting with the intent of reducing future errors.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2027
42 Enhance Customer Experience	Perform traffic stops and other necessary duties to enforce registration law requirements for vehicles safety/emission, auto theft, and tax collection purposes.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
43 Enhance Customer Experience	Pilot project for renewal kiosks located in DMV offices to allow customers to self-serve.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2027
44 Quality Work Environment/Sound Leadership	Prepare and submit annual budget, including compensation, technology, building, and other needs.	Operations: Budget Team	Budget request will be submitted	FY2027
45 Quality Work Environment/Sound Leadership	Prepare Department Operations report.	Operations: Budget Team and Agency Leadership	Existing budget	FY2027
46 Enhance Customer Experience	Process petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; provide administrative support for administrative appeals hearings and related mediation and status conferences; provide administrative support for commission meetings; prepare documents for the commissioners and administrative law judges; and perform other administrative and clerical duties, as requested.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2027
47 Enhance Customer Experience	Process tax returns and refunds timely while maintaining quality processing standards.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2027
48 Quality Work Environment/Sound Leadership	Provide guidance to staff based on established goals, track progress and adjust strategies as needed for growth and collaboration.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2027
49 Enhance Customer Experience	Provide joint division efforts to better educate and inform customers by using website how-to guides and videos, publishing monthly webinars, developing and holding Tax Roadshows throughout the state, promoting the practitioner hotline, and other methods.	Tax & Revenue FA: Income Tax and Education & Business Taxes and Discovery Divisions	Existing budget	FY2027
50 Enhance Customer Experience	Receive petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; hold formal administrative appeals hearings and related mediation and status conferences consistent with Utah Administrative Procedures Act, Utah Tax Code, Utah Motor Vehicle statutes and applicable Utah Administrative Rules; draft, deliberate and issue resulting Commission orders.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
51 Enhance Customer Experience	Receive private letter ruling (PLR) requests based on fact specific situations, which are not under appeal; perform administrative law judge researches and analyze statutes and administrative rules to interpret the law and provide guidance to the taxpayer regarding the applicability of the law to the taxpayer's specific situation; communicate the analysis with divisions and other interested parties as necessary; perform a full commission review; and submit final PLR to taxpayer.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2027
52 Quality Work Environment/Sound Leadership	Relocate Farmington DMV office to join new regional center at the request of DFCM.	Customer Services and Enforcement FAs: DMV Divisions	May have current year supplemental budget request, DTS support (network design) & DFCM (logistics support)	FY2027
53 Quality Work Environment/Sound Leadership	Finalize relocation of Ogden DMV office to improve facilities, costs, and location.	Customer Services and Enforcement FAs: DMV Divisions	May request nonlapsing authority for one-time moving expenses appropriated in FY2026, DTS support (network design) & DFCM (logistics support)	FY2027
54 Quality Work Environment/Sound Leadership	Relocate Richfield DMV office to join new regional center at the request of DFCM.	Customer Services and Enforcement FAs: DMV Divisions	May have current year supplemental budget request, DTS support (network design) & DFCM (logistics support)	FY2027
55 Quality Work Environment/Sound Leadership	Renewal of maintenance and support agreement for FAST products (Utah's tax and motor vehicle systems).	Operations: Budget Team	Budget request may be submitted	FY2027
56 Enhance Customer Experience	Research topics and issues that are lacking in the statewide property tax valuation community, including both centrally and locally assessed property. Prepare and provide presentations for the three day Assessor School Training that is statutorily required by the agency to sponsor, attended by elected county officials, county office staff, agency staff and commissioners, county contractors, and legislators.	Property & Misc. Tax FA: All divisions as needed by topic	Existing budget	FY2027
57 Promoting Innovation and Leveraging Technology	Resolve issues relating to levy match to ensure efficient process and increase program participation.	Customer Services FA: Special Services Division	Existing budget, DTS support & FAST	FY2027
58 Quality Work Environment/Sound Leadership	Respond to 2025 IRS Onsite Safeguard Review findings using the corrective action plan.	Operations: Security and Disclosure Team	May have a current year supplemental budget request (to remediate findings)	FY2027
59 Quality Work Environment/Sound Leadership	Review and discuss long-term legislative planning items for proposal to the legislature.	Operations: Policy, Planning and Public Affairs Team	Existing budget	FY2027

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
60 Quality Work Environment/Sound Leadership	Review and respond to 2027 general legislative session bills: number of bills will be updated after the legislative session.	Operations: Agency Legislative Response Team	Existing budget & DTS support	FY2027
61 Quality Work Environment/Sound Leadership	Review performance measures for adjustment as needed; report on previous years' measures.	Operations: Budget Team	Existing budget	FY2027
62 Promoting Innovation and Leveraging Technology	Review program return edits to determine if manual intervention is needed.	Tax & Revenue FA: Financial Operations and Income Tax and Education Divisions	Existing budget	FY2027
63 Quality Work Environment/Sound Leadership	Update Annual Report and Strategic Plan.	Operations: Reporting	Existing budget	FY2027
1 Enhance Customer Experience	Analyze, assess, and act upon customer service response outcome results and indicators to understand roadblocks and challenges in order to provide needed and desired services, measured in several ways including customer service feedback surveys and analysis tools by using Qualtrics products (both the website survey instrument and XM Discover), direct feedback from tax professionals, legislators, the Governor's office and other state partners, text message surveys, and other tools.	Agency: Customer Service Support Teams	Existing budget, DTS support & FAST	FY2028
2 Enhance Customer Experience	Complete self-review projects on four unique industry groups to educate taxpayers and improve compliance.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2028
3 Quality Work Environment/Sound Leadership	Conduct internal audit risk assessments to determine the level of agency risk in various areas of performance to ensure adequate internal and management controls exist; and communicate results to executive leadership and the commissioners.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2028
4 Quality Work Environment/Sound Leadership	Conduct internal audits at the request of agency leadership to investigate areas of risk; and communicate the audit results and recommendations to the commissioners and agency leadership as applicable to each audit.	Commission: Internal Audit	Existing budget & DTS support as needed	FY2028
5 Enhance Customer Experience	Continue to develop (as needed) and adjust self-serve process through TAP to allow customer the ability access pertinent information from their accounts, including applicable changes in the law, filing deadlines/requirements, confirmations of return receipt and refund status, and other needs based on customer feedback.	Tax & Revenue FA: Income Tax and Education Division	Existing budget, DTS support & FAST	FY2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
6 Enhance Customer Experience	Continue to develop and deliver focused online training workshops for county elected officials, school districts, county administrators, special districts, and other taxing entities and their staff to provide education for enhanced and accurate compliance to statutory requirements.	Property & Misc. Tax FA: Subject matter experts	Existing budget	FY2028
7 Enhance Customer Experience	Coordination between agency, DTS, and other governmental entities on data sharing agreements and legislation.	Agency: Systems Support Team	Existing budget & DTS support	FY2028
8 Enhance Customer Experience	Develop and implement management controls and calculations, both within tax systems and manual processes, timely to ensure complexities in revenue distribution required by statute are accurately determined and distributed monthly on behalf of state and local jurisdictions.	Tax & Revenue FA: Financial Operations Division	Existing budget, DTS support & FAST	FY2028
9 Enhance Customer Experience	Develop, enhance, and conduct training courses (both on-site and in the field) to provide education to agency and county personnel to equip them with the necessary knowledge and skills to achieve licensed appraiser status and certification for Utah. The training also provides continuing education (CE) credits, helping attendees maintain their licenses and skill levels.	Property & Misc. Tax FA: Property Tax and Centrally Assessed Divisions	Existing budget	FY2028
10 Quality Work Environment/Sound Leadership	Develop, test, and put into production tax and motor vehicle systems adjustments from bills passed during previous and current fiscal year general legislative session: number of bills will be updated annually - GS 2027.	Agency: Systems Support Team	Future budget or current year supplemental may be requested, DTS support & FAST as applicable according to the law	FY2028
11 Enhance Customer Experience	Enforce the collection of tax on the sales of CBD products, including field audits and collaborating with the Department of Agriculture and Food.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2028
12 Enhance Customer Experience	Enforce tobacco master settlement agreement by performing field audits and site inspections and reviewing for adherence to escrow payments from the non-participating cigarette manufacturers to ensure payments are being placed in the escrow account as required under the agreement.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2028
13 Enhance Customer Experience	Enhance reporting tools to provide support and guidance on each county's data collection systems and processes to assist the counties in better understanding their own data and to accurately communicate that to the agency; this will allow the agency to provide better oversight.	Property & Misc. Tax FA: Property Tax Division	Existing budget	FY2028
14 Enhance Customer Experience	Ensure sales tax compliance on: 1) motor vehicle purchases, 2) aircraft purchases, and 3) foreign purchases (as identified through Customs reports).	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
15 Promoting Innovation and Leveraging Technology	Evaluate agency's TIME (tolerate, invest, migrate, and eliminate) and SAFe (scaled agile framework) systems with DTS.	Agency: Executive Leadership Team	Existing budget & DTS support	FY2028
16 Quality Work Environment/Sound Leadership	Finalize Pay for Performance plan year, assess where all evaluations are rated for the year to be able to allocate the funds based on success level throughout the agency, perform calculations and employee increases and allocations, ensure accurate results, and submit to DHRM.	Operations: Budget Team	Existing budget	FY2028
17 Enhance Customer Experience	Generate, review and submit to the legislature as required by law to show the results of increased enforcement of the Electronic Cigarette and Nicotine Product Licensing and Taxation Act.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2028
18 Enhance Customer Experience	Generate, review, and submit the Electronic Cigarette Product Registry Report to the legislature as required by law.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget & DTS support	FY2028
19 Promoting Innovation and Leveraging Technology	Implement chatbot for the motor vehicle portal.	Customer Services FA: Motor Vehicle Division	Existing budget, DTS support & FAST	FY2028
20 Promoting Innovation and Leveraging Technology	Improve and expand data collection and analysis capabilities which will allow the agency to provide improved assessments for better tax rate certification. This impacts both centrally and locally assessed properties, as evidenced through property assessments and statistical reports the agency provides to the Governor's Office, legislature, and others as required.	Property & Misc. Tax FA: All divisions	Existing budget & DTS support may be needed	FY2028
21 Quality Work Environment/Sound Leadership	Maintain and conduct training programs for tobacco, CBD, and e-cig program staff.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2028
22 Promoting Innovation and Leveraging Technology	Maintain and update Certified Tax Rate system.	Property & Misc Tax FA: Systems group	Existing budget	FY2028
23 Enhance Customer Experience	Maintain Electronic Cigarette Product Registry.	Enforcement FA: Cigarette, CBD, and Tobacco Enforcement Section	Existing budget	FY2028
24 Promoting Innovation and Leveraging Technology	Maintain electronic licensing program and options for both dealer and sales representative licensees to allow downloads, apply for and renew online licenses, this will include management of the inspection process necessary for new licensees.	Enforcement FA: Motor Vehicle Enforcement Division	Budget request may be submitted from a restricted account, DTS support & FAST	FY2028
25 Enhance Customer Experience	Maintain Renewal Express, On-the-Spot (OTS), Vehicle Title Lien and Registration (TLR) programs.	Customer Services FA: Systems Team	Existing budget, DTS support & Tyler Technologies Utah (3rd party vendor)	FY2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
26 Promoting Innovation and Leveraging Technology	Maintain system to communicate location of impounded vehicles with Insurite and other necessary parties' systems and determine actions necessary to process the vehicles out of impound.	Enforcement FA: Motor Vehicle Division - Title & Dealer Services	Existing budget, DTS support, FAST & 3rd party vendors as necessary	FY2028
27 Promoting Innovation and Leveraging Technology	Maintain T-CAP and ongoing Salesforce licenses.	Commission: Staff as needed	Existing budget & DTS support	FY2028
28 Promoting Innovation and Leveraging Technology	Manage and develop active tax and motor vehicle public website system interfaces.	Agency: Systems Support Team	Existing budget, DTS support & FAST	FY2028
29 Enhance Customer Experience	Manage and develop websites, including changes, improvements, corrections, and other postings.	Operations: Web Development Team	Existing budget	FY2028
30 Enhance Customer Experience	Manage and track dealer license plate inventory orders to ensure all requirements under law are satisfied and appropriate, review and audit dealer plate sales for compliance, provide training to dealers and law enforcement on statutory requirements.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2028
31 Quality Work Environment/Sound Leadership	Manage retention schedule, including review and update record series as needed and identify personal identifiable information in each series for privacy program management; respond to privacy requests as needed.	Operations: Records and Privacy Team	Existing budget	FY2028
32 Quality Work Environment/Sound Leadership	Participate in and conduct Peace Officer Standards Training (POST) for officer recertification.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2028
33 Enhance Customer Experience	Participate in national motor vehicle enforcement organizations to track trends regarding illegal motor vehicle activity (fraud and theft practices), improve our inspection process, and gather and participate in other industry enhancements and officer safety.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2028
34 Enhance Customer Experience	Perform all necessary types of vehicle identification number (VIN), dealership lot, body shop, state impound yard tow, crushers and dismantler, and dealer-sale files inspections.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2028
35 Quality Work Environment/Sound Leadership	Perform annual Incident Response & COOP tabletop exercise.	Operations: Emergency Preparedness Team	Existing budget	FY2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
36 Enhance Customer Experience	Perform revenue duties, including providing fiscal impact responses as requested by the legislature, provide economic indicator and state revenue forecasts; update data reports monthly, quarterly, and annually as needed; assist with legislative implementation; respond to data and analysis requests from the legislature, governor's office, and other entities; complete special projects as assigned by the commissioners; and serve as hearing officers and provide expert consultation and testimony in district court property tax cases for centrally assessed properties, as requested.	Commission: Economic and Statistical Unit	Existing budget	FY2028
37 Enhance Customer Experience	Perform sales tax check ups with customers to help them establish a process to ensure they satisfy filing and record requirements for correct tax reporting with the intent of reducing future errors.	Tax & Revenue FA: Business Taxes and Discovery Division	Existing budget	FY2028
38 Enhance Customer Experience	Perform traffic stops and other necessary duties to enforce registration law requirements for vehicles safety/emission, auto theft, and tax collection purposes.	Enforcement FA: Motor Vehicle Enforcement Division	Existing budget	FY2028
39 Quality Work Environment/Sound Leadership	Prepare and submit annual budget, including compensation, technology, building, and other needs.	Operations: Budget Team	Budget request will be submitted	FY2028
40 Quality Work Environment/Sound Leadership	Prepare Department Operations report.	Operations: Budget Team and Agency Leadership	Existing budget	FY2028
41 Enhance Customer Experience	Process petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; provide administrative support for administrative appeals hearings and related mediation and status conferences; provide administrative support for commission meetings; prepare documents for the commissioners and administrative law judges; and perform other administrative and clerical duties, as requested.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2028
42 Enhance Customer Experience	Process tax returns and refunds timely while maintaining quality processing standards.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2028
43 Quality Work Environment/Sound Leadership	Provide guidance to staff based on established goals, track progress and adjust strategies as needed for growth and collaboration.	Tax & Revenue FA: Financial Operations Division	Existing budget	FY2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
44 Enhance Customer Experience	Provide joint division efforts to better educate and inform customers by using website how-to guides and videos, publishing monthly webinars, developing and holding Tax Roadshows throughout the state, promoting the practitioner hotline, and other methods.	Tax & Revenue FA: Income Tax and Education & Business Taxes and Discovery Divisions	Existing budget	FY2028
45 Enhance Customer Experience	Receive petitions for administrative appeals of county board of equalization decisions and Tax Commission actions; facilitate communication between administrative appeals participants, including document exchanges; hold formal administrative appeals hearings and related mediation and status conferences consistent with Utah Administrative Procedures Act, Utah Tax Code, Utah Motor Vehicle statutes and applicable Utah Administrative Rules; draft, deliberate and issue resulting Commission orders.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2028
46 Enhance Customer Experience	Receive private letter ruling (PLR) requests based on fact specific situations, which are not under appeal; perform administrative law judge researches and analyze statutes and administrative rules to interpret the law and provide guidance to the taxpayer regarding the applicability of the law to the taxpayer's specific situation; communicate the analysis with divisions and other interested parties as necessary; perform a full commission review; and submit final PLR to taxpayer.	Commission: Commissioners and Administrative Law Judges	Existing budget	FY2028
47 Promoting Innovation and Leveraging Technology	Redevelop collection stages after Core 21 system upgrades.	Customer Services FA: Special Services Division	Budget request may be submitted, DTS support & FAST	FY2028
48 Enhance Customer Experience	Reexamine Collection of Motor Vehicle Fees contract with counties under the new central distribution and e-title process.	Customer Services FA: Motor Vehicle Division	Budget request may be submitted, DTS support & AGs	FY2028
49 Quality Work Environment/Sound Leadership	Relocate Vernal DMV office to join new regional center at the request of DFCM.	Customer Services and Enforcement FAs: DMV Divisions	May have current year supplemental budget request, DTS support (network design) & DFCM (logistics support)	FY2028
50 Quality Work Environment/Sound Leadership	Renewal of maintenance and support agreement for FAST products (Utah's tax and motor vehicle systems).	Operations: Budget Team	Budget request may be submitted	FY2028

Strategic Plan Goal	Strategy Work Item	Agency Functional Area (FA) and Work Item Champion	Budget and Resource Needs (including third-party vendor FAST Enterprises, LLC, and others)	Completion or Budget Request Year
51 Enhance Customer Experience	Research topics and issues that are lacking in the statewide property tax valuation community, including both centrally and locally assessed property. Prepare and provide presentations for the three day Assessor School Training that is statutorily required by the agency to sponsor, attended by elected county officials, county office staff, agency staff and commissioners, county contractors, and legislators.	Property & Misc. Tax FA: All divisions as needed by topic	Existing budget	FY2028
52 Quality Work Environment/Sound Leadership	Respond to 2025 IRS Onsite Safeguard Review findings using the corrective action plan.	Operations: Security and Disclosure Team	May have a current year supplemental budget request (to remediate findings)	FY2028
53 Quality Work Environment/Sound Leadership	Review and discuss long-term legislative planning items for proposal to the legislature.	Operations: Policy, Planning and Public Affairs Team	Existing budget	FY2028
54 Quality Work Environment/Sound Leadership	Review and respond to 2028 general legislative session bills: number of bills will be updated after the legislative session.	Operations: Agency Legislative Response Team	Existing budget & DTS support	FY2028
55 Quality Work Environment/Sound Leadership	Review performance measures for adjustment as needed; report on previous years' measures.	Operations: Budget Team	Existing budget	FY2028
56 Promoting Innovation and Leveraging Technology	Review program return edits to determine if manual intervention is needed.	Tax & Revenue FA: Financial Operations and Income Tax and Education Divisions	Existing budget	FY2028
57 Quality Work Environment/Sound Leadership	Update Annual Report and Strategic Plan.	Operations: Reporting	Existing budget	FY2028