

Mission: to proudly serve New Mexico with fair and efficient tax administration, revenue distribution, and motor vehicle services

Core Values

RESPECT

- Promote safety, empowerment and inclusion
- Treat others with civility, empathy, and dignity
- Actively listen and value the contributions of others
- Ensure accessibility to all

INTEGRITY

- Adhere to the highest ethical standards
- Honor our commitments
- Protect our financial and human resources
- Safeguard customer information and rights

INNOVATION

- Challenge conventional thinking and be open to change
- Practice continuous improvement in efficiency and service quality
- Encourage and recognize diverse perspectives and creativity

COMMUNICATION

- Ensure timely, thoughtful and effective connections
- Promote respectful, meaningful exchanges of ideas
- Demonstrate transparency

EXCELLENCE

- Ensure accountability
- Deliver an exceptional customer experience
- Provide timely and consistent guidance
- Support team growth and development

3-Year Vision Statement

- Exceed expectations for customer and employee satisfaction
- Inspire a skilled, knowledgeable, and service-oriented team
- Foster a culture of integrity, respect, and inclusion
- Earn the trust of our customers
- Empower customers through outreach and education
- Offer innovative and secure solutions to maximize customer experience

Goal 1: Customer Experience

- 1.1 Expand Customer Outreach and Education
- 1.2 Expand Customer Options and Accessibility
- 1.3 Simplify Processes to Improve Customer Service and Compliance
- 1.4 Serve Government Customers through Strong Enforcement and Collection

Goal 2: Team Excellence

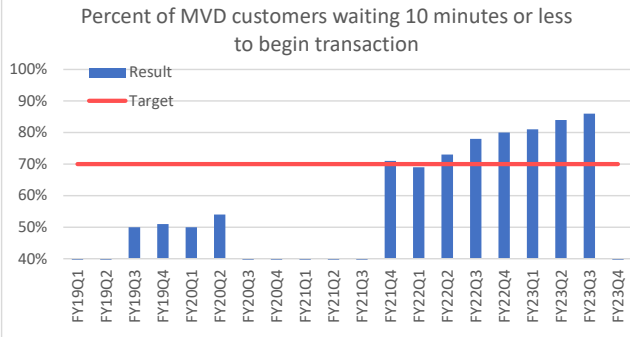
- 2.1 Grow and Develop Managers and Employees
- 2.2 Recruit and Retain Skilled, Qualified Employees
- 2.3 Create a Safe and Fair Workplace
- 2.4 Promote Internal Communication

Goal 3: Operational Excellence

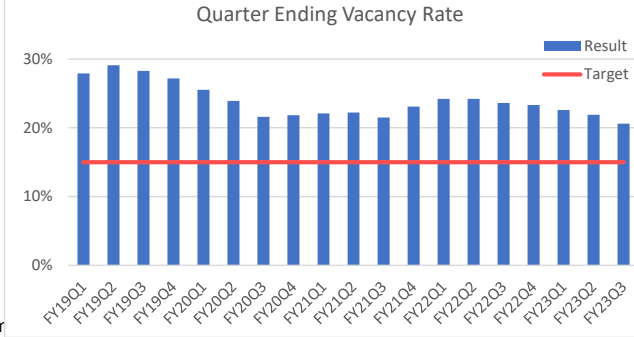
- 3.1 Expand Governance Framework
- 3.2 Review Processes for Efficiency and Internal Control
- 3.3 Ensure Regulations and Statutes are Comprehensive, Consistent, and Informative
- 3.4 Monitor Disaster Recovery and Business Continuity Plans
- 3.5 Ensure Robust Oversight of Contractual Expenditures

Taxation and Revenue Department Strategic Plan Highlights

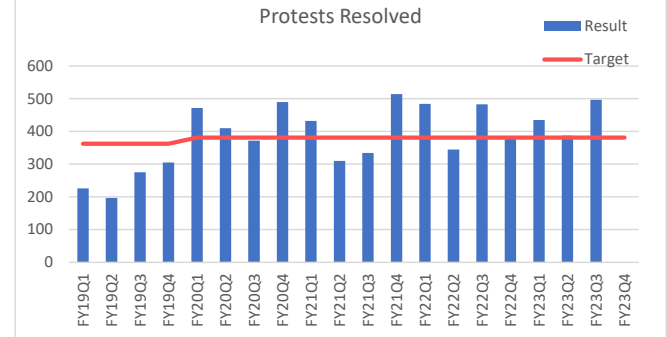
Goal 1: Customer Experience



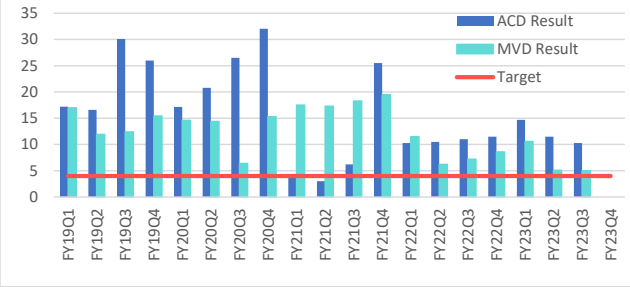
Goal 2: Team Excellence



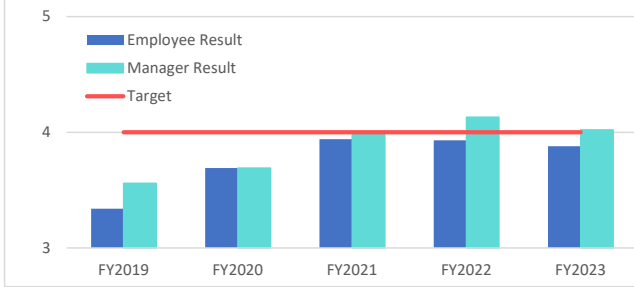
Goal 3: Operational Excellence



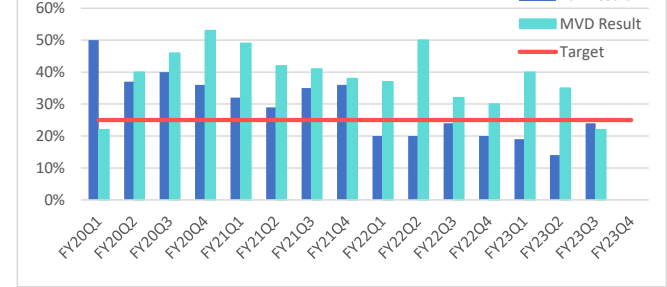
MVD and ACD Call Center Minutes to Reach an Agent



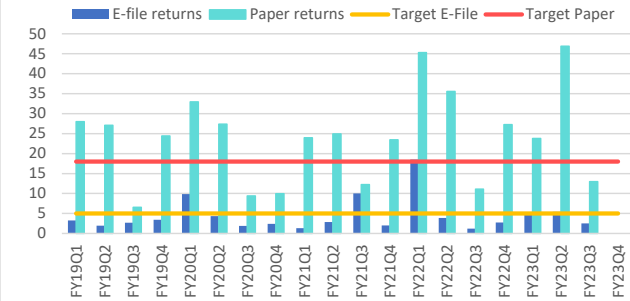
Corporate Culture Survey Overall Satisfaction Rating (0-5)



IT Requests (SQRs) Closed Per Quarter



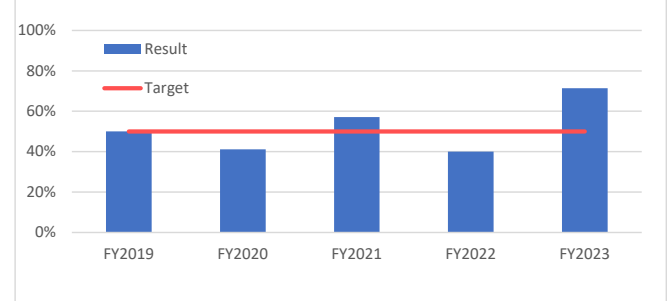
Days to Process PIT Returns



Employee Turnover Within First Year of TRD Employment



Percent Prior Year Audit Findings Resolved



TAXATION AND REVENUE DEPARTMENT STRATEGIC PLAN

		FY2023				FY2024				FY2025				FY2026				Notes
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
	Implementation Lead																	
Objective 1.2 Expand Customer Options and Accessibility																		
Action 1.2.1 Expand MVD kiosk technology in retail and other locations	MVD Director	X	X	X														Three kiosks in Albuquerque. New kiosks support cash payments.
Action 1.2.2 Expand Secure Messaging in Taxpayer Access Point (TAP)	RPD Director	X	X	X														Received presentation of Wisconsin model. Implementation would require non-recurring funding
Action 1.2.3 Identify and address tax.newmexico.gov navigation and content issues	Public Information Officer	X	X	X														Ongoing
Action 1.2.4 Create position responsible for tax website and YouTube content changes	ASD Director																	
Action 1.2.5 Implement HB22, translation and interpretation services	Public Information Officer																	
Action 1.2.6 Implement live chat functionality	ACD Deputy for Compliance																	
Action 1.2.7 Expand MVD e-services (i.e. mobile driver's licenses, E-Title, etc.)	MVD Director																	
Action 1.2.8 Align TAP process with current MEF refund process	RPD Director																	
Performance Measure 1.2.1.1 Percent of all audits initiated that are managed audits. Target: 30% or more	ACD Deputy for Audit	36%	30%	32%														
Performance Measure 1.2.1.2 Percentage of audits that are not abated within the 10 year collection period. Target 80% or more	ACD Deputy for Audit		81%	81%	81%													
Performance Measure 1.2.1.3 Average ACD call center wait time to reach an agent. Target: 4 minutes or less	ACD Call Center Manager	14.7	11.50	10.27														FY23Q1 record 367,869 calls due to rebates
Performance Measure 1.2.1.4 Average dropped call rate in ACD call center. Target: 15% or less	ACD Call Center Manager	15%	19%	19%														Up to 104 employees added to taking calls due to 2022 rebates
Performance Measure 1.2.1.5 Average MVD call center wait time to reach an agent in minutes. Target: 4 minutes or less (HB2 measure)	MVD Deputy Director for Field Operations	10.6	5.1	5.0														Call center vacancy rate fell to 10% at end of FY23Q1
Performance Measure 1.2.1.6 Average dropped call rate in MVD call center. Target: 20% or less	MVD Deputy Director for Field Operations	41%	23%	21%														Vacancy rate affecting dropped call rate
Performance Measure 1.2.1.7 Number of MVD transactions completed using kiosks in field offices or retail locations. Target: Continued steady growth	MVD Director	724	715	695														
Performance Measure 1.2.1.8 Average number of days to work paper correspondence. Target: less than 10 days	RPD Director																	
Performance Measure 1.2.1.9 Percentage of state MVD field offices with same day or next day appointment. Target: 95% or more	MVD Deputy Director for Field Operations	96%	96%	96%														
Performance Measure 1.2.1.10 Number of MVD private partners trained and onboarded to provide driver services. Target: 1 partner office per quarter	MVD Deputy Director for Central Operations	0	0	0														
Objective 1.3 Simplify Processes to Improve Customer Service and Compliance																		

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		FY2023				FY2024				FY2025				FY2026				Notes
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
	Implementation Lead																	
Action 1.3.1 Review tax return and refund processing rules to eliminate any non-value added steps and improve task management	RPD Director	X	X	X														Correspondence automation C2 project underway. Credit for taxes paid review improvements identified for tax year 2022.
Action 1.3.2 Migrate protest case into Gentax	Protest Manager	X	X	X														Non-recurring funding received during 2023 regular session
Performance Measure 1.3.1.1 Percentage of cases into protest to resolve at lower level and improve protest case management	Tax Policy Director	X																Non-recurring funding requested from 2023 regular session. Work together with Chief Legal. Work on in PAR meetings
Performance Measure 1.3.1.2 Percent of MVD customers with wait time of 10 minutes or less. Target: 70% or more	MVD Deputy for Field Operations	81%	84%	86%														
Performance Measure 1.3.1.4 Average wait time in MVD field offices in minutes. Target: 10 minutes or less (HB2 measure)	MVD Deputy for Field Operations	5.3	5.4	4.3														
Performance Measure 1.3.1.5 Average number of calendar days to process electronically filed PIT returns. Target: 5 days or less	RPD Director	5	5	3														Recent performance slowed due to 2022 rebate processing
Performance Measure 1.3.1.6 Average calendar days to process paper filed PIT returns. Target: 18 days or less	RPD Director	24	47	13														Recent performance slowed due to 2022 rebate processing
Performance Measure 1.3.1.7 Average calendar days to issue PIT refunds for electronically filed returns. Target: 15 days or less	RPD Director	57	33	8														Recent performance slowed due to 2022 rebate processing
Performance Measure 1.3.1.8 Average calendar days to issue PIT refunds for paper filed returns. Target: 45 or less	RPD Director	89	104	72														Recent performance slowed due to 2022 rebate processing
Performance Measure 1.3.1.9 Average number of calendar days to issue refunds requested through TAP. Target: 50 days or less	RPD Director	183	86	129														Working to adjust manual TAP refund process.
Performance Measure 1.3.1.10 Number of tax protest cases resolved. Target 1,525 or more per year, average 381 or more per quarter (HB2 measure)	Protest Manager	435	387	497														FY22 closed 1,690 protests
Performance Measure 1.3.1.11 Number of state-assessed property tax valuation protests resolved informally within the applicable taxable year. Target 80% or more	PTD Director	NA	64%	NA	NA	NA		NA	NA	NA		NA	NA	NA		NA	NA	Of 118 FY23 protests 75 settled
Performance Measure 1.3.1.12 Percent of returns flagged for Questionable Return Unit (QRU) review ultimately identified as fraudulent. Target: 5% or more	ACD Compliance Deputy Director	24.2%	3.8%	0.4%														The higher the percentage, the fewer returns falsely flagged for fraud. FY23Q3: 218 fraud/54508 flagged. Many false positives in recent quarter with implementation of FIVS, rules are being adjusted. FIVS identified an additional 1081 fraud

TAXATION AND REVENUE DEPARTMENT STRATEGIC PLAN

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	Implementation Lead	FY2023				FY2024				FY2025				FY2026				Notes
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Performance Measure 2.3.1.1 Corporate culture survey overall satisfaction target for managers. Target 4.00 or greater	Chief Internal Auditor	NA	NA	4.02	NA	NA	NA		NA	NA	NA		NA	NA	NA		NA	Satisfaction rose despite COVID, budget reductions, and higher vacancies
Performance Measure 2.3.1.2 Corporate culture survey overall satisfaction target for employees. Target 4.00 or greater	Chief Internal Auditor	NA	NA	3.88	NA	NA	NA		NA	NA	NA		NA	NA	NA		NA	Satisfaction consistent despite COVID, budget reductions, and higher vacancies
Performance Measure 2.3.1.3 Percent of survey recipients participating in corporate culture survey Target: 60% or more	Chief Internal Auditor	NA	NA	88%	NA	NA	NA		NA	NA	NA		NA	NA	NA		NA	FY22 participation declined over previous year but still historically high
Performance Measure 2.3.1.4 Slips, trips, falls and other workplace injury claims filed per quarter. Target: 0	HR Bureau Chief	4	0	6														Data obtained through Risk Management Division reports
Objective 2.4 Promote Internal Communication																		
Action 2.4.1 Implement communications team workplan	Public Information Officer	X	X	X														Recent communications team work on HB22 language access, cannabis, rebates, non-filers
Action 2.4.2 Hold annual leadership retreat to include discussion of mission, vision, values, and review of strategic plan	Cabinet Secretary				X													Executive retreat with David Markwardt held in FY23Q4
Action 2.4.3 Hold quarterly Coffee Talk forum open to all employees	Cabinet Secretary	X		X	X													
Action 2.4.4 Publish quarterly Tax & Rev Today employee newsletter	Public Information Officer	X			X													
STRATEGIC GOAL 3 OPERATIONAL EXCELLENCE																		
Objective 3.1 Expand Governance Framework																		
Action 3.1.1 Implement governance, risk and compliance software to track compliance and findings	Chief Internal Auditor	X	X	X														Received funding in 2022 regular session. PCC approved initiation phase 6/27/22
Action 3.1.2 Convene security steering committee quarterly to review Tax & Rev security, risks, and compliance	Chief Information Security Officer																	Security subcommittee/working group work delayed due to urgent priorities and staff vacancies. Governance and developing a charter are priorities. Continued work on IRS FTI Audit, IRS Corrective Action Plan
Action 3.1.3 Complete Collections Analytics C2 project	Chief Information Officer	X	X	X														C2 funding for collections analytics approved in 2022 session, sole source procurement underway

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		FY2023				FY2024				FY2025				FY2026				Notes
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
	Implementation Lead																	
Action 3.1.4 Maintain compliance with federal audit requirements (IRS, DOJ, SSA) and promptly resolve findings	Chief Internal Auditor	X	X	X														FY22Q1 completed triennial IRS safeguard audit, findings down from 2018. Corrective Action Plan submitted 1/30/22. Service Level Agreement with DOIT executed in FY23Q1
Performance Measure 3.1.1.1 Percent of last triennial IRS audit findings resolved. Target: 70% or more per year	Chief Internal Auditor	TBD	36%	TBD														Updates on audit findings due to IRS semi-annually. Corrective Action Plan for the findings from the August 2021 IRS review submitted timely in January 2022
<u>Objective 3.2 Review Processes for Efficiency and Internal Control</u>																		
Action 3.2.1 Implement COSO-based monitoring and reporting for each division	Deputy Cabinet Secretary	X	X	X														Continuing work on documenting procedures, reviewing internal controls, completing internal audit annual workplan
Action 3.2.2 Seek Quality New Mexico Baldrige award for performance excellence	Deputy Cabinet Secretary																	
Action 3.2.3 Identify and Implement streamlined processing of returned mail items	RPD Director																	
Performance Measure 3.2.1.1 Number of emergency procurements submitted to Financial Control Division. Target 0	ASD Director	0	1	0														
Performance Measure 3.2.1.2 Percent of IT requests (SQRs) for tax system changes closed during the quarter. Target: 25% or more	Chief Information Officer	19%	14%	24%														Recent major projects reduced time to complete SQRs (legislative implementation, C2s)
Performance Measure 3.2.1.3 Percent of IT requests (SQRs) for motor vehicle system changes closed during the quarter. Target: 25% or more	Chief Information Officer	40%	35%	22%														
Performance Measure 3.2.1.4 Percent of prior year state audit findings resolved. Target:50% or more	ASD Director	71%	NA	NA	NA													FY22 resolved 5/7 prior findings. FY21 resolved 4/10. FY20 resolved 8/14. FY19 resolved 7/17
Performance Measure 3.2.1.5: Timely process DWI inquiries. Target: 3 business days	MVD Deputy Director Central Operations	3	2	2														
Performance Measure 3.2.1.6: Timely process surety bonds: Target: 2 weeks	MVD Deputy Director Central Operations	12	12	14														
<u>Objective 3.3 Ensure Regulations and Statutes are Comprehensive, Consistent, and Informative</u>																		

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		FY2023				FY2024				FY2025				FY2026				Notes
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
	Implementation Lead																	
Action 3.3.1 Propose administrative clean up legislation every 60-day session	Cabinet Secretary	X	X	X														4 out of 4 Tax & Rev bills enacted in 2023 session
Performance Measure 3.3.1.1 Rulemaking hearings/regulations addressed per quarter. Target: 1 or more except 0 in Q3	Tax Policy Director	2	2	0														
Objective 3.4 Monitor Disaster Recovery and Business Continuity Plans																		
Action 3.4.1 Review, update and test tax disaster recovery plan annually	Chief Information Officer	NA	X	NA	NA	NA		NA	NA	NA		NA	NA	NA		NA	NA	
Action 3.4.2 Review, update and test MVD disaster recovery plan annually	Chief Information Officer	NA	X	NA	NA	NA		NA	NA	NA		NA	NA	NA		NA	NA	
Action 3.4.3 Review and update tax business continuity plan annually	Chief Internal Auditor																	
Action 3.4.4 Review and update MVD business continuity plan annually	Chief Internal Auditor																	
Action 3.4.5 Test business continuity plans for divisions quarterly	Chief Internal Auditor																	
Objective 3.5 Ensure Robust Oversight of Contractual Expenditures																		
Action 3.5.1 Establish tax IT steering committee that meets quarterly to review non-recurring funding requests, report progress, document lessons learned	Chief Information Officer	X	X	X														Regular leadership meetings are held on initiatives and work prioritization. Executive steering committee meets monthly.
Action 3.5.2 Establish MVD IT steering committee that meets quarterly to review non-recurring funding requests, report progress, document lessons learned	Chief Information Officer	X	X	X														Regular leadership meetings are held on initiatives and work prioritization. Executive steering committee meets monthly.
Performance Measure 3.5.1.1 Number of CPO certified employees. Target: 7 or more	ASD Director	10	9	10														Ale Rodriguez, Desiree Tristee-Aragon, Annette Reynolds, Santiago Chavez, Maria Atencio, Miranda Ntoko, Luz Trujillo, Amanda Maez, Annie Knight