



STRATEGIC PLAN 2021-2025

“The strategic plan is a useful tool
that communicates the big picture
for our agency and shows how
everyone’s work contributes
to our mission.”

- Pat Browne

Secretary of Revenue

MESSAGE FROM THE SECRETARY

2021 - 2025

On behalf of the Department of Revenue, we are pleased to share our agency's strategic plan for 2021-2025. This is an important document that establishes our key goals and defines the steps the department is taking in the short-term to meet these goals. The strategic plan is also designed to be a useful tool for our workforce so that everyone can see the big picture for our agency and how everyone's work contributes to our mission of fairly, efficiently, and accurately administering Pennsylvania tax and Lottery programs.

Importantly, our strategic plan is supported by the work we are doing with OurRevenue Results. OurRevenue Results was launched in 2020 — prior to the start of the COVID-19 pandemic — as a performance management system that focuses on both operational and strategic excellence. OurRevenue Results is a way for us to define and measure important outcome and process measures, which gives us a better understanding of the work we do and how well we are doing it. Now that we have OurRevenue Results and an updated strategic plan, we have improved resources in place for analyzing our department's performance. At the same time, we have a way to show all of our employees how important they are to our overall success.

I would like to thank the group of roughly 50 mid-level managers who participated in a workgroup that set out to revise our strategic plan. Much of this work occurred after the pandemic hit Pennsylvania, meaning the group had to adapt quickly to a virtual environment to continue with its task. However, the workgroup learned that this new environment actually helped to foster inclusive conversations and made it easier to include employee voices from across our offices in the commonwealth. This was a great example of our adaptability, perseverance, and commitment to our strategic planning process.

Sincerely,

A handwritten signature in gold ink that reads "Patrick M. Browne".

Pat Browne
Secretary of Revenue

PURPOSE

2021 - 2025



MISSION



VISION

PURPOSE

Funding programs and services to benefit all Pennsylvanians.

MISSION

To fairly, efficiently, and accurately administer Pennsylvania tax and Lottery programs.

VISION

To be an innovative, customer-focused, and employee-centered agency.



ORGANIZATIONAL CHART

2021 - 2025



VALUES

2021 - 2025



We act with integrity.

We are honest, ethical, and do what is right.

- We focus on quality over quantity.
- We provide consistent service.
- We consistently apply laws, policy, and procedure.
- We ensure integrity in Lottery drawings.
- We take responsibility.
- We fix and learn from our mistakes.

We are inclusive.

We act in a manner that is diverse, fair, respectful of differences, and welcoming for both employees and our customers.

- We listen to understand.
- We are respectful of others' opinions and viewpoints.
- Everyone's thoughts and ideas are valued.
- We seek and can voice contrary opinions honestly, respectfully, and constructively.
- We are aware of and build the self-worth of others.

We are connected.

We establish rapport with our employees and customers to understand and meet their needs by providing necessary information and support.

- We engage in two-way dialog through townhalls, front-line focus group, and staff meetings.
- We are open to and seek feedback, both internally and externally.
- We give of our time.
- We listen to understand.
- We connect with others on a human level.
- We provide continuous feedback to management.



VALUES

2021 - 2025



We are service-oriented.

We provide professional, helpful, high-quality service before, during, and after the customer's needs are met.

- We give of our time.
- We provide exemplary service through accurate and timely responses.
- We communicate and ensure understanding.
- We are consistent in our words and actions.
- We show empathy.
- We help others learn and grow.

We are adaptable.

We are flexible, resilient, and able to modify our ideas and behaviors to deal with new and evolving situations.

- We are open to change.
- We are willing to take calculated risks and adjust.
- We use data to identify trends and to make informed decisions.
- We are resilient and rebound after setbacks and challenges.

We are continuously learning.

We invest in our employees' growth and build a culture of learning.

- We are open to learning from staff at all levels.
- We engage in both formal and informal learning.
- We are intentional about our growth as employees and as an organization.
- We mentor staff to promote learning and development.



GOALS

2021 - 2025

Strategic goals are a clearer statement of the department's vision.

Our initiatives help us accomplish our mission and our stated goals by converting these concepts into specific, measurable, and achievable actions.

Goal 1

Transform the customer service experience.

Goal 2

Modernize systems to enhance tax and lottery administration.

Goal 3

Promote voluntary tax compliance through education, communication, and service.

Goal 4

Continually improve lottery sales and net profits.

Goal 5

Identify and address barriers to human diversity, equity, and inclusivity.

Goal 6

Develop our workforce for current and future growth.

Goal 7

Use data-informed decision making to manage operations and inform stakeholders.

Goal 8

Expand and promote a sustainable Lean culture.

Goal 9

Instill public confidence.



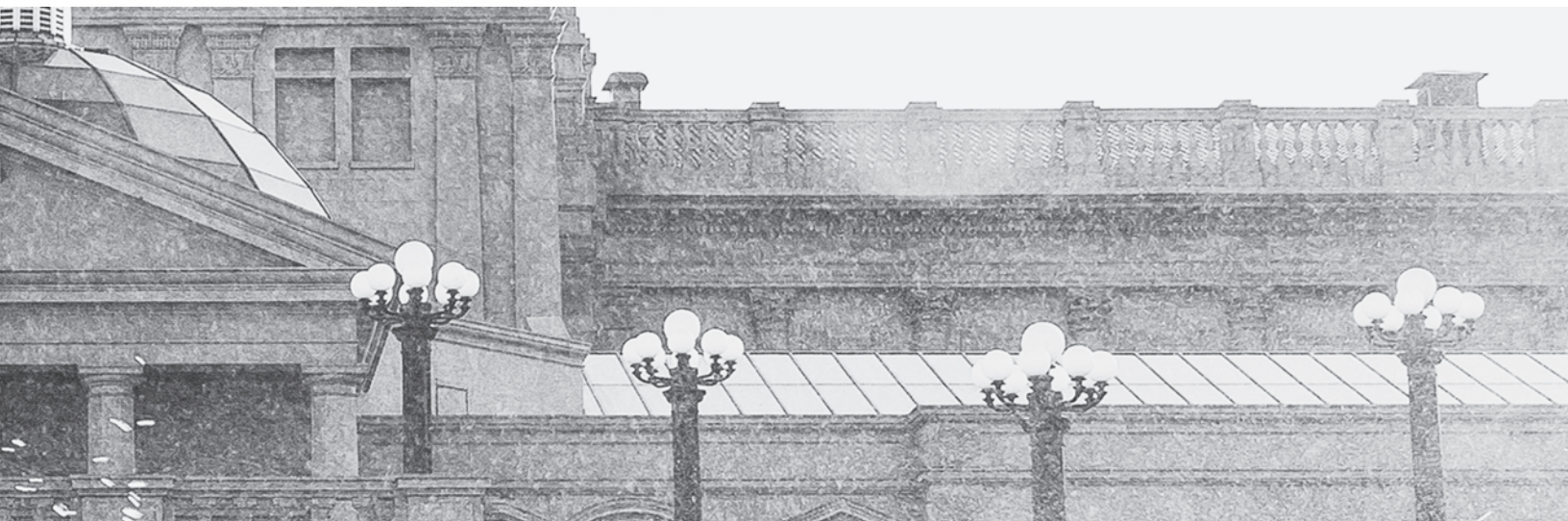
GOAL 1

TRANSFORM THE CUSTOMER SERVICE EXPERIENCE



The department will improve the quality, efficiency, and effectiveness of service delivery by developing a wide range of self-service and customized service initiatives, by simplifying the tax filing and payment experience, and by helping all sectors of the public participate in the tax system.

- ▼ Enhance the collection and analysis of customer feedback data.
- ▼ Communicate service enhancements and improvements to our customers.
- ▼ Restructure the department's website and content.
- ▼ Communicate in plain language for notices, instructions, publications, and online content.
- ▼ Translate forms and instructions into other languages.



GOAL 2

MODERNIZE SYSTEMS TO ENHANCE TAX AND LOTTERY ADMINISTRATION

The department will modernize its processes, encourage innovation, and replace legacy technology systems to effectively and efficiently address its enforcement and service needs.



- Implement modernized tax and Lottery systems.
- Adopt and expand the use of robotic process automation.
- Expand customer-centric services, such as self-service options, chatbots, Lottery vending options.



GOAL 3

PROMOTE VOLUNTARY TAX COMPLIANCE THROUGH EDUCATION, COMMUNICATION, AND SERVICE



The department will ensure taxpayers meet their tax obligations so when Pennsylvanians pay their taxes, they can be confident their neighbors and competitors are sharing the total tax burden equitably.

- ▼ Expand outreach and education programs and content.
- ▼ Publish and communicate timely tax guidance.
- ▼ Measure effectiveness of compliance and outreach and education programs.
- ▼ Identify and remove barriers to make it easier for customers to voluntarily comply.
- ▼ Develop partnerships with external agencies, associations, and groups for knowledge sharing and best practices.



GOAL 4

CONTINUALLY IMPROVE LOTTERY SALES AND NET PROFITS



The department will maximize sales and profits of the Pennsylvania Lottery through sound business practices, innovation, and creativity, by focusing on being:

- ▼ Convenient: Convenient for retailers to sell and players to play.
- ▼ Relevant: Deliver relevant products in relevant ways.
- ▼ Ubiquitous: Available everywhere people are looking for entertainment.
- ▼ Modern: Embrace technology and operate like a modern business.



GOAL 5

IDENTIFY AND ADDRESS BARRIERS TO HUMAN DIVERSITY, EQUITY, AND INCLUSIVITY



The department's Human Diversity, Equity, and Inclusion initiative is committed to creating a culture that is diverse, fair, and welcoming for both our employees and our customers. We aim to create a human-centered culture that identifies opportunities and recommends concrete actions to enhance diversity, equity, and inclusion, both internally and externally.

- Increase awareness and knowledge around human diversity, bias, and systemic racism.
- Develop a human diversity, equity, and inclusion strategic plan.
- Implement action plans for the identified areas of focus.
- Analyze our tax administration and policy with a focus on human DEI.



GOAL 6

DEVELOP OUR WORKFORCE FOR CURRENT AND FUTURE GROWTH



The department will attract, hire, and retain qualified staff, providing development opportunities for both current and future professional growth and making available the necessary tools and resources to maximize performance and to attain organization.

- ▼ Centralize employee onboarding.
- ▼ Focus on tax technical training for all employees.
- ▼ Promote mentoring for individual growth and to support new employees and supervisors.
- ▼ Develop a strategy to engage and recognize employees.
- ▼ Grow leadership capabilities through formal and informal development opportunities.
- ▼ Develop a succession planning and knowledge transfer strategy.
- ▼ Promote employee wellbeing and physical safety, virtually, on-site, and in the field.



GOAL 7

USE DATA-INFORMED DECISION MAKING TO MANAGE OPERATIONS AND INFORM STAKEHOLDERS



The department will continue to develop and embrace necessary analyses, models, and projections to enable the DOR workforce, the Governor's Office, the General Assembly, and other interested parties to make data informed decisions about legislative changes, enforcement, outreach and education, and litigation.

- ▼ Enhance and expand our data capabilities.
- ▼ Expand the OurRevenue Results performance management system.
- ▼ Establish a departmental Data Governance strategy and goals.



GOAL 8

EXPAND AND PROMOTE SUSTAINABLE LEAN CULTURE



The department is committed to empowering and equipping our employees to build a culture of continuous improvement using Lean principles and methodologies so that we can more effectively serve each other and the citizens of the commonwealth.

- Increase measurable improvements and participation in improvement work.
- Communicate leadership roles and responsibilities to promote a Lean culture.
- Improve Lean communications and collaboration on improvements.
- Build a community of Lean thinkers/champions at every level and area.
- Expand Adoption of Lean culture.



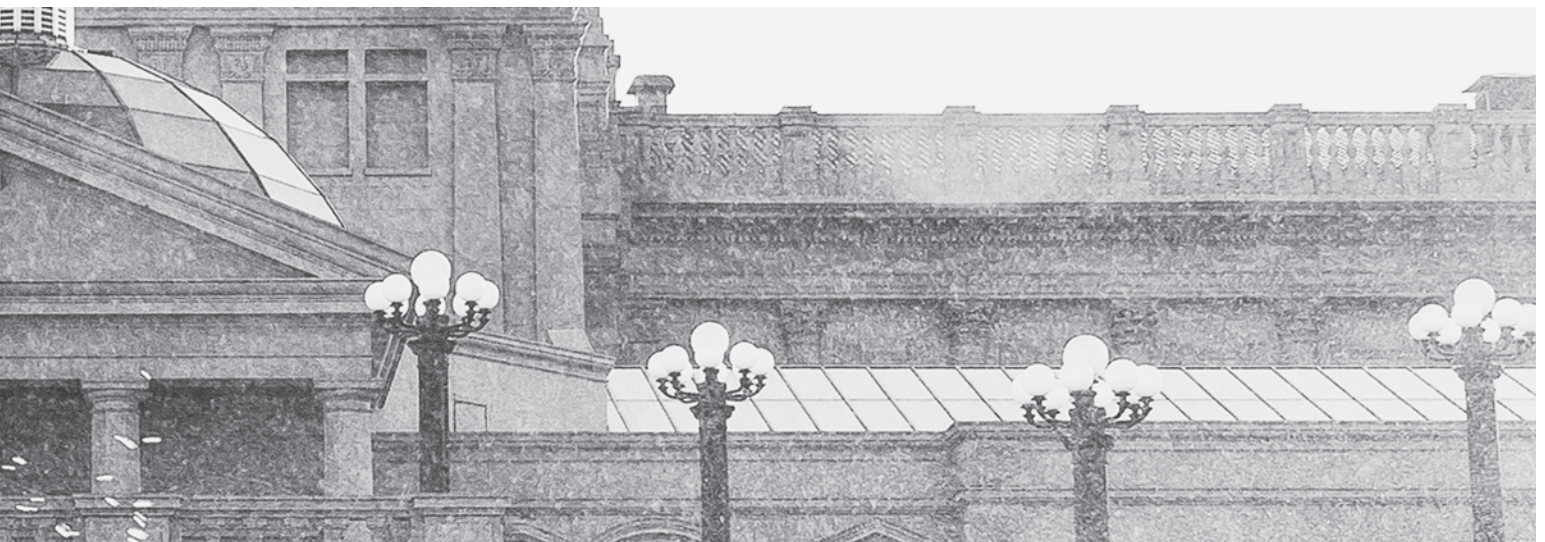
GOAL 9

INSTILL PUBLIC CONFIDENCE



The department commits to listening to feedback from customers and utilizing technology to provide a consistent and transparent approach to customer service. The department is also committed to maintaining the privacy and security of sensitive customer information, and fairly, equitably, and consistently applying the law.

- ▼ Strengthen our capacity to assess, measure and manage risk.
- ▼ Coordinate fraud management and prevention across tax types.
- ▼ Protect confidential data while providing expanded customer access to their information.




ACHIEVEMENTS

2021 - 2025

STRATEGIC PLAN ACCOMPLISHMENTS

- Strategic Plan Update for 2021-2025
- Financial Institution Data Match Program
- Transportation Revenue Options Commission Participation
- Expansion of Our Revenue Results to the Deputates
- Implementation of All Taxes in PATH
- 50th Anniversary Celebration Including \$50 Instant Ticket
- Transition to Telework for Most Employees
- Mentoring Program Development
- John Maxwell Leadership Development
- Human Diversity, Equity, and Inclusion Committee
- Implementing Department-wide change management strategies
- PNC Bank Account Verification & Authorization Process
- Implemented TraCs for Online Citations
- Phone Line Consolidation





This document was developed pursuant to Act 47 of 2001, which calls on the Pennsylvania Department of Revenue to develop and publish a strategic plan on March 1st of odd-numbered years.

PENNSYLVANIA DEPARTMENT OF REVENUE

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