



IDR PERFORMANCE REPORT

For

Fiscal Year 2011

Courtney M. Kay-Decker

Director

INTRODUCTION

On behalf of the staff of the Iowa Department of Revenue, I am pleased to present our Fiscal Year 2011 Annual Report. IDR's mission is "To serve Iowans and to support government services in Iowa by collecting all taxes required by law, but no more."

The Iowa Department of Revenue (IDR) deposits over 90% of the state's appropriable receipts. Other state agencies depend on timely deposits to provide the funds they use to operate. We work to accomplish this by providing taxpayers with current and complete information, and up-to-date technology to support tax filings and payments. This report provides information about some of the ways in which that mission was accomplished during the past fiscal year.

IDR monitors performance of four core functions, under which there are six services, products and activities (SPAs). In all, 74 measures are used to monitor the core functions and the SPAS in IDR's Performance Report. Sixty-five measures or 88% were met or exceeded during the fiscal year.

Performance measures monitoring the core functions of local government assistance show the IDR has done well in education and service to local governments. All twelve of the outcome measures met or exceeded their targets.

Performance measures monitoring the core functions of revenue collection and compliance show that 31 of the 39 outcome measures met or exceeded their targets. All measures that involved revenue collections exceeded their target.

Performance measures monitoring the core functions of research, analysis and information management show IDR has met its goals in providing taxpayer analysis and economic and statistical research. All ten of the outcome measures in this area met or exceeded their targets.

Performance measures monitoring the core functions of resource management show that these units have supported the agency well, meeting its targets within budget. A total of 12 of the 13 outcome measures met or exceeded their targets.

We recognize our responsibilities to Iowa taxpayers and service is a priority. We are pleased to offer our professional services through the Internet and will continue to make progress and improve on those services. Our actions comply with the statutory provisions of the State of Iowa, and our duties under those statutes are carried out in a fiscally responsible manner.

Yours truly,



Courtney M. Kay-Decker, Director

AGENCY OVERVIEW

Mission

The mission of the Iowa Department of Revenue, as established by Iowa Code Section 421.2, is to serve Iowans and to support government services in Iowa by collecting all taxes required by law, but no more.

Taxes Established by Iowa Code

The taxes and fees administered by the Department include:

Individual Income Tax	Consumer Use Tax	Motor Fuel Taxes
Corporation Income Tax	Retailer Use Tax	Fiduciary Tax
Partnership Income Tax	Hotel / Motel Tax	Inheritance & Estate Taxes
Franchise Income Tax	Local Option Tax	Cigarette / Tobacco Tax
Sales Tax	Withholding Tax	Drug Stamp Tax
Property Tax	Replacement Tax	Real Estate Transfer Tax
Motor Vehicle Registration Fee	Car Rental Tax	Moneys & Credits Tax

Vision and Guiding Principles

IDR established the following *vision* and *guiding principles* in its 2007-2010 Strategic Plan:

Vision

To be recognized as a department employing a well-trained workforce that in a fair and respectful manner provides responsive and accurate services that enables all customers to comply with Iowa's tax law.

Guiding Principles

Customer Focus:

- We will encourage collaboration and partnership with our internal and external customers.
- We operate in an ever-changing environment and will integrate advanced technology into our work processes in order to make them more efficient and of higher value to our customers.

Integrity:

- We will through honest and open policies maintain the public's confidence in our ethical standards.
- We will carefully safeguard our customer's confidential information.

Responsibility:

- We will provide expert advice and support to policy-makers and to local and state government entities.
- We will help local governments responsibly manager their resources through education and supervision of the property tax system and local option taxes.

Understanding:

- We will recognize that Iowa tax laws are complex and will provide the services and education necessary to enable compliance by all our customers.
- We understand that to have a well educated and responsive work force we need to provide our employees with ongoing training to develop their professional skills and to achieve personal growth.

Fiscal Management:

- We will responsibly manage our financial resources to fulfill our mission.
- We will continually monitor and measure our internal processes to assure economy and efficiency.
- We work with the Legislative Branch to recommend fiscally sound legislation that reflects obligations of the State.

Core Functions

Our core functions are as follows:

Local Government Assistance – Provide assistance to local governments by administering fair and equitable assessments and programs for property tax relief and local option sales.

Revenue Compliance and Collection – Educate customers on tax policy and collect revenues in compliance with Iowa's tax laws, including processing and collections, policy development, education, examination, audit, and timely resolution of disputed tax issues.

Research, Analysis, and Information Management – Provide tax policy analysis, fiscal impact estimation, and economic and statistical research and analysis to help customers, stakeholders, and policy-makers make informed decisions.

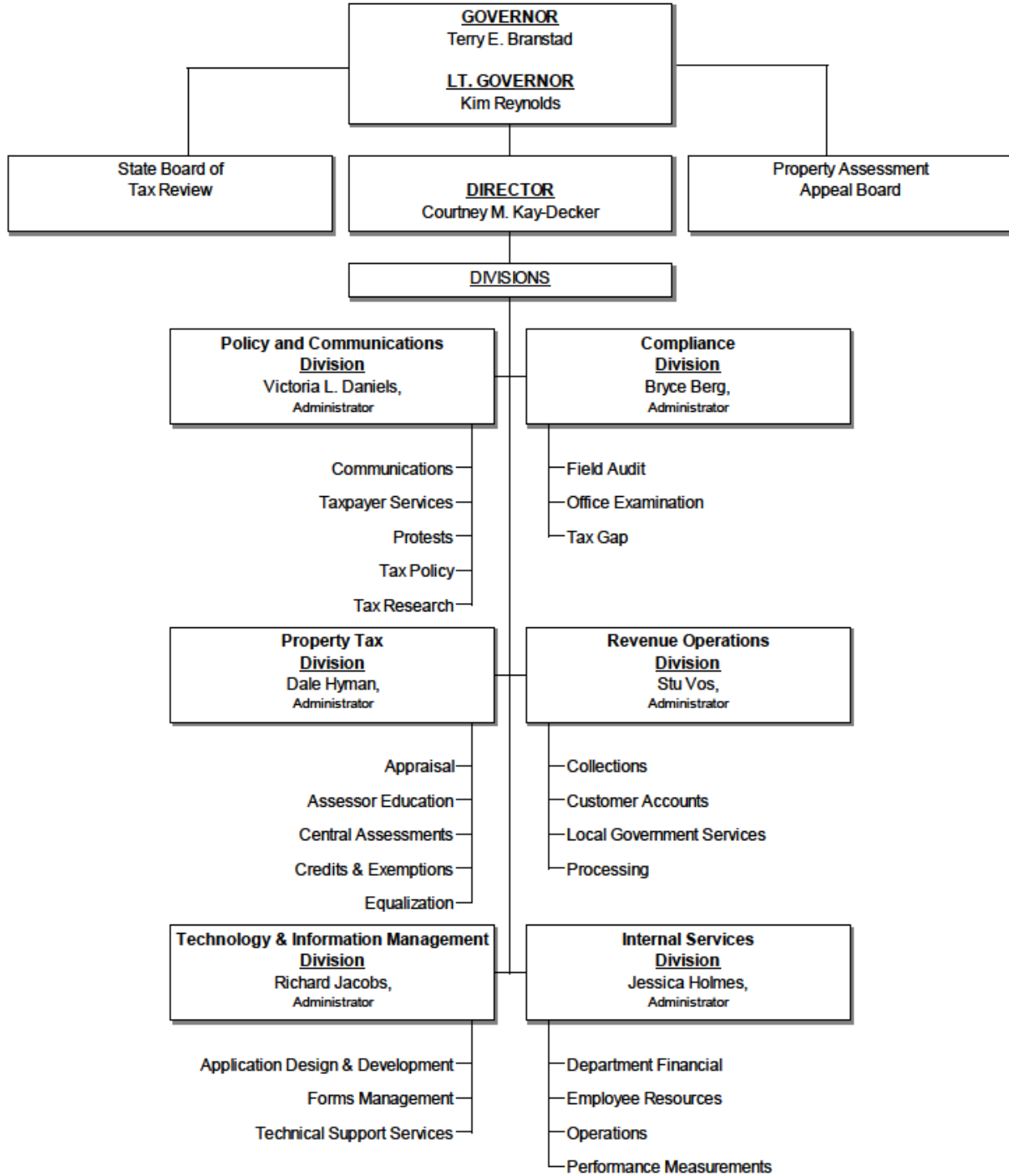
Resource Management – Provide vital infrastructure necessary to administer and support agency operations, including personnel, the agency's Web site, performance measurements, and the development and support of technology and information applications.

Department Operational Units

The organization is structured into six operational units. The following chart is an overview of the Department's primary organizational entities and services provided. Leadership positions are identified as of June 30, 2011.

IOWA DEPARTMENT OF REVENUE

The Department includes two review boards for budgetary purposes.



Customers

The Department's customer base is, by its very nature, one of the largest of Iowa State governmental agencies. In addition to all persons with Iowa tax responsibilities throughout the state and nation, the Department deals with all levels of state, local and federal governments, tax practitioners, business groups, state employees, the legislature, and other states' revenue agencies.

The Department deposits over 90% of the state's appropriable receipts. Other state agencies depend on timely deposits to provide the funds they use to operate. Externally, taxpayers expect timely processing of returns and refunds, and that an audit billing is accurate and understandable, among other things.

Each customer expects information and products to be disseminated timely, accurately, and clearly. This expectation holds true for both external inquiries and for products generated by the Department.

Staff

The Director of the Iowa Department of Revenue is Courtney M. Kay-Decker. She was appointed by Governor Branstad in January 2011. As of June 30, 2011, there were 306 full-time employees working for the Department. Two employees worked at an out-of-state location, 61 were assigned to 10 field offices across Iowa, and the remaining 243 were domiciled in Des Moines.

All contract-covered job classifications in this Department fall under the AFSCME bargaining agreement. The Department Director is a position appointed by the governor.

Goals, Measures And Results

In our Strategic Plan, we identified seven goals, and a number of strategies to achieve those goals. This Performance Plan summarizes our tactical steps toward achieving those goals. In the pages that follow, we highlight six noteworthy achievements. Thereafter, we have summarized the results of each of the measures identified in our Fiscal Year 2011 Performance Plan.

KEY RESULT

Core Function: Revenue Collections and Compliance

GOAL: Provide consistent, fair and professional program of collections services.

Description: The Department of Revenue collects delinquent tax debt and also provides collection services to the Iowa Judicial Branch, Department of Human Services and Department of Natural Resources. The Collection Enterprise is self-supporting.

Why we are doing this: To provide quality, efficient, and competitive collection services.

What we are doing to achieve results: The Collection Enterprise completed a major upgrade to collection software and coordinated that effort with a business process reengineering designed to maximize the effectiveness of the new software and to utilize nationally recognized best practices.

Results

Performance Measure:

Cost to Collect

Performance Target:

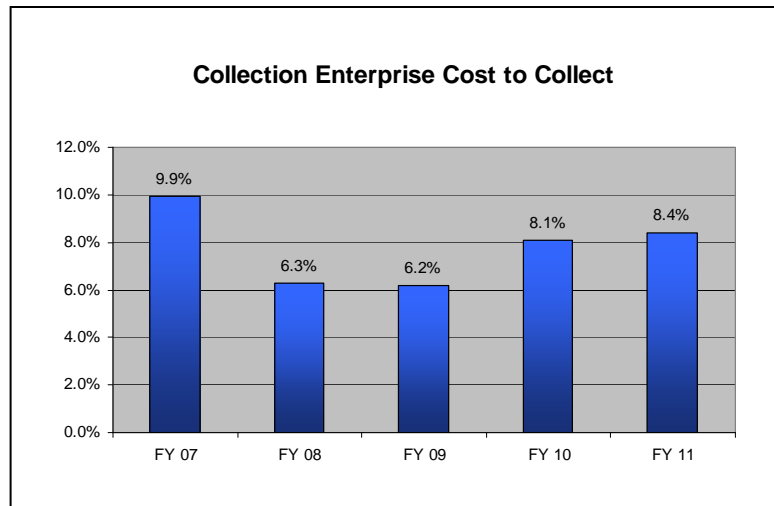
Ratio of Cost to Collections will be 10% or lower

What was Achieved:

The cost to collect to collect for fiscal year 2011 was 8.4% *

Data Sources:

Collections Annual Report



Resources: Cost to collect includes all units of the Collections Enterprise

* Collection cost as a percent of amount collected has increased nominally due to upgrading systems in fiscal year 2010. In fiscal year 2011 the Department experienced recession related decreases in collections. The estimated cost to collect for fiscal year 2012 is 7.3%, reflecting improved collections.

KEY RESULT

Core Function: Revenue Collections and Compliance

Goal: We will improve our methods of processing tax returns, payments, and managing tax revenues so that these transactions will be timely, accurate, and cost effective.

Description: Percent of Dollars Deposited on the Same Day as Receipt.

Why are we doing this: Prudent money management principles require that revenues be deposited as quickly as possible to maximize investment proceeds and cash flow, and to provide for accurate accounting. The timely deposit of revenues ensures that funds are available for the continued provision of state government services.

What we are doing to achieve results: The Revenue Operations Division deploys strategies to improve deposit of sales tax and income tax withholding during high-volume quarterly periods. The Department also provides easy access for electronic deposit for business taxes. Eighty-seven percent (87%) of dollars received are deposited the same day. The remaining 13% is deposited the day after receipt, and generally consists of paper checks that must be separated from a return.

Results

Performance Measure:

Percent of dollars deposited on the same day as received

Performance Target:

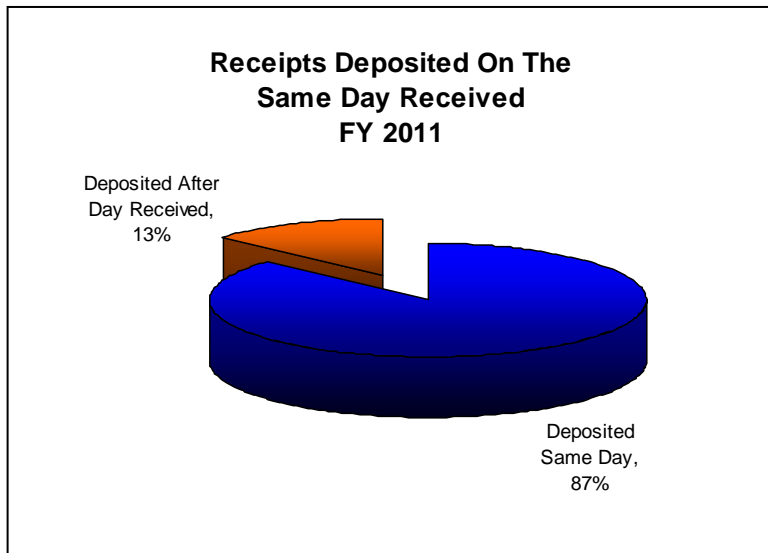
85% of dollars received will be deposited on the same day as received

What was achieved:

87% of dollars received into the Department were deposited on the same day as receipt

Data Sources:

Revenue Operations reports and information systems



KEY RESULT

Core Function: Revenue Collections and Compliance

Goal: We will create an environment of collaboration and partnership in order to improve voluntary compliance with Iowa's tax system.

Description: The Examination and Audit Sections review returns covering 14 major taxes established by Iowa law. These sections determine unpaid tax liabilities and bill for the correct amount of tax. The staff tries to make audits both educational and informative to avoid the need for future audits of the same taxpayer.

Why are we doing this: To encourage the voluntary compliance with Iowa's tax system.

What we are doing to achieve results: The Examination and Audit Sections integrate internal and external databases to enhance compliance and enforcement.

Results

Performance Measure:

Total Revenue Collected
Per Dollar Spent

Performance Target:

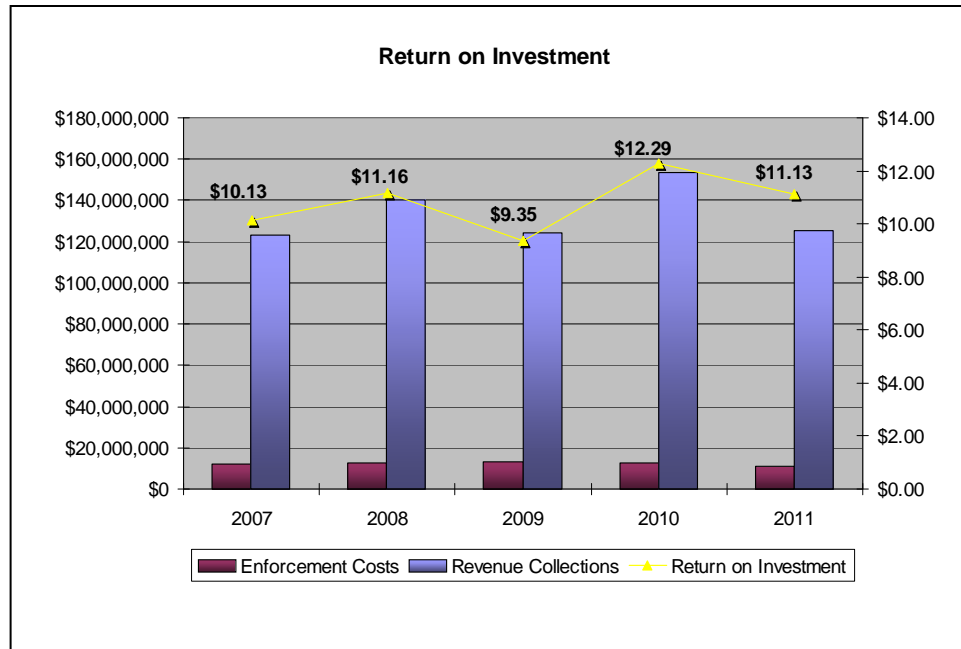
Collect \$9 for every
Dollar spent on
Enforcement

What was achieved:

In fiscal year 2011 the
Return on Investment was
\$11.13 *

Data Sources:

Compliance Division Return
on Investment and Cost
Benefits reports. Business Objects query tools



* In fiscal year 2010 there was a single payment of \$13.1 million processed. This payment inflated the Return on Investment number for fiscal year 2010. If this payment was removed, the Return on Investment for fiscal year 2011 would show growth over fiscal year 2010.

KEY RESULT

Core Function: Resource Management

Goal: We will improve our methods of processing tax returns, payments, and managing tax revenues so that these transactions will be timely, accurate, and cost effective.

Description: Increase utilization of electronically-filed income tax programs each year.

Why we are doing this: Electronic filing of tax returns is viewed by the Department as an effective way to improve the performance efficiency of the Department, while providing our customers with a more accurate way to file their tax returns. Where applicable, customers benefit from receiving a tax refund in less time than if the return were filed on paper.

What we are doing to achieve results: The Department offers access to electronic filing of individual income tax return software as well as access to free filing web sites. The software located on our web site has been monitored to assure that it is compatible with our tax forms and systems. In addition, the Department has worked to promote electronic filing to the general public and several key customer groups in cooperation with agencies and non-profit organizations throughout the state.

Results

Performance Measure:

Percent of electronically-filed individual income tax returns

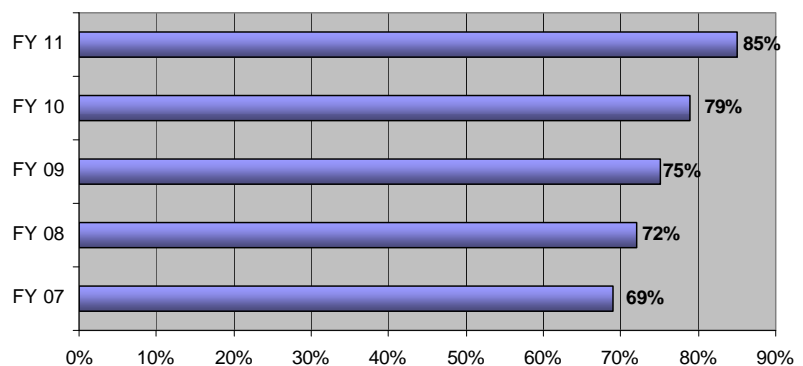
Performance Target:

79% of individual income tax returns will be filed electronically for the tax processing year 2011

What was Achieved:

The Department received 85% of individual income tax returns electronically

Percent of Individual Income Tax Returns Filed Electronically



Data Sources:

Department of Revenue information systems

KEY RESULT

Core Function: Resource Management

Goal: We will improve our methods of processing tax returns, payments, and managing tax revenues so that these transactions will be timely, accurate, and cost effective.

Description: The Department of Revenue receives and processes over 1.5 million individual income tax returns from taxpayers each year. Some taxpayers must pay additional tax when filing their returns. However, a majority of taxpayers are entitled to refunds. The Department recognizes that taxpayers entitled to refunds prefer having their payments in a timely manner.

Why we are doing this: To serve the taxpayers of Iowa by processing tax information so that refunds are issued in a timely manner.

What we are doing to achieve results: The Iowa Department of Revenue has two key systems for processing individual income tax returns. One system is used to process returns filed on paper documents. The second system is for processing electronically-filed returns. The Department monitors the processing efficiency and turn-around time for both systems. The Department continues to promote the quick refund turnaround time as a taxpayer benefit to electronically filing returns. The 4% of electronic refunds that are not issued in 14 days are returns that must go to income resolution for review of errors.

Results

Performance Measure:

Percent of electronically-filed individual income tax refunds issued within 14 days

Performance Target:

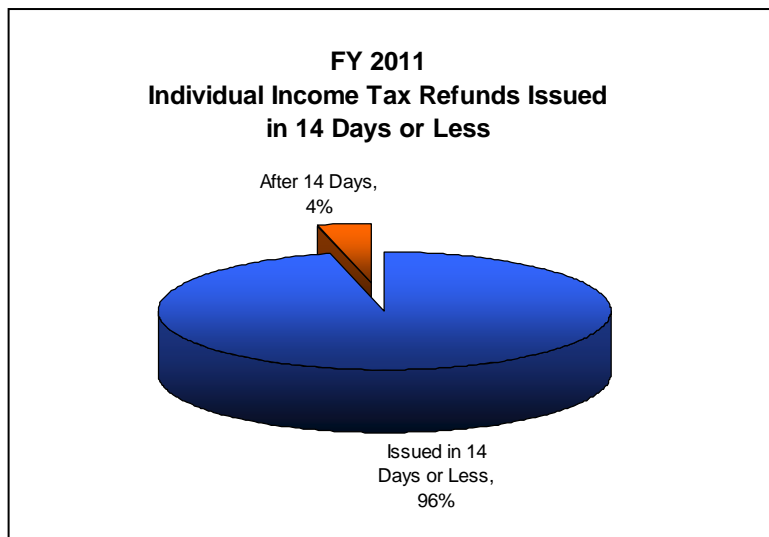
95% of refunds issued in 14 days

What was Achieved:

The Department met its goal of 95% of electronic refunds issued in fourteen days or less

Data Sources:

Iowa Revenue Information System (IRIS)



KEY RESULT

Core Function: Resource Management

Goal: We will improve our methods of processing tax returns, payments, and managing tax revenues so that these transactions will be timely, accurate, and cost effective.

Description: Customer satisfaction with online systems.

Why we are doing this: Taxpayers want to conduct business with the Department at their convenience. They also want their returns and refunds processed quickly and cost-effectively. Online services are intended to fulfill these needs.

What we are doing to achieve results: Electronic filing for individual income tax returns and business taxes is offered 24 hours a day. The Department continues to devote resources to add and improve e-commerce options.

Results

Performance Measure:

Taxpayer satisfaction with our electronic services

Performance Target:

Score of 4 or better on the Department's customer satisfaction survey (survey scale 1 – 5)

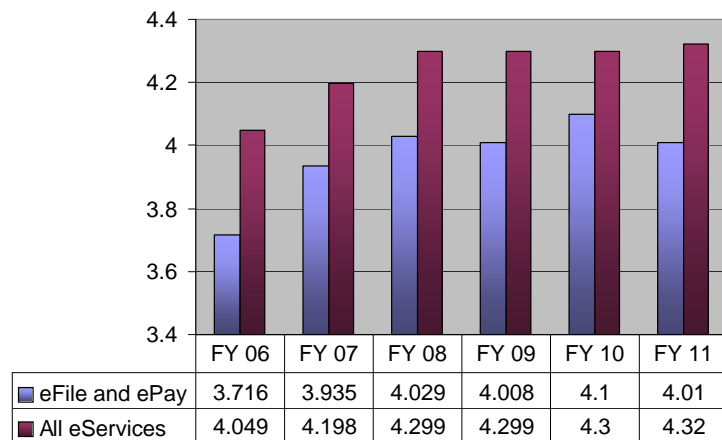
What was Achieved:

The Department scored 4.01 on its customer satisfaction survey in Fiscal Year 2011

Data Sources:

Iowa Department of Revenue communications section

Customers Respond Positively to Department eServices



**Agency Performance Report
FISCAL YEAR 2011**

Name of Agency: Iowa Department of Revenue

Agency Mission: The Iowa Department of Revenue will serve Iowans and support government services in Iowa by collecting all taxes required by law, but no more.

Core Function: Local Government Assistance

Performance Measure (Outcome)	Performance Target	Performance Actual	Performance Comments & Analysis
1. % of jurisdictions within statutory assessment level tolerance			
Agricultural	75%	83%	The agricultural orders issued dropped from 31 in calendar 2009 to 18 in calendar 2011.
Residential	75%	97%	The residential orders issued dropped from 13 in calendar year 2009 to 3 in calendar 2011.
Commercial	75%	92%	The commercial orders issued dropped from 20 in calendar year 2009 to 9 in calendar year 2011.
2. Number of appraisals completed to date	100% by December 2011 (840)	100%	Appraisals will be completed by January 2011.
3. Automation of collection information from counties	75% automated by 06/30/11	100%	Reports to be automated include: Abstracts, Board of Review Reports, Utility Reports, and Exempt Property Reports. Estimated time June 30, 2011. Source: Application for course credit forms by assessors and deputy assessors.
4. Number of assessment officials requiring continuing education	Send exam results by 11/07/10 - 05/09/11	Deadlines were met	
5. Notify assessors of need for continuing education	Notify by 08/31/10 - 01/31/11	Deadlines were met	
6. Timely responses to questions regarding Credits/Exemptions and Transfer Tax	Oral response <=2 working days Written Response <=5 Days	100% Timely Response	

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Core Function: Local Government Assistance

Service, Product or Activity			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Number of utility and railroad assessments completed	261	273	
2. Number of replacement tax assessments completed	138	177	
Property Assessment Appeal Board			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Number of protests from Board of Review	350 protests in reassessment years and 50 protests in non-reassessments years	1,791 in reassessment year 733 in interim year	Exceeded numbers for both reassessment and non-reassessment years.
2. Processing time for appeal process	90% of decisions prior to properties' second delinquency date	98%	

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Core Function: Resource Management

Technology and Information Management			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of utilization of individual electronic filing program	79%	85%	
2. Percent of utilization of the Iowa e-file services system (withholding/sales-returns)	97%	97%	
3. Percent of utilization of the Iowa e-file services system (withholding/sales-transactions)	60%	71%	
4. Percent of online system work time availability (IRIS, network, e-file)	99%	99%	
Director's Office			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of internal audit project hours spent on tier 1 audits	75%	90.0%	

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Core Function: Resource Management

Internal Services Division			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. New Employee Orientation	100% of new employees will take orientation class within six months of hire.	0	Due to budget constraints and probable lay offs no classes were held in FY 11.
2. Employee satisfaction - average composite score on employee satisfaction survey	4 or >	4.3	
3. Span of control supervisor/employee	1:15 or >	1:17	
4. Average number of sick days taken	9.53	9.7	
5. Percent of employee evaluations complete	100%	92%	
6. Percent of budget to expenditures	% of expenditures does not exceed 100% of budget.	99.0%	
7. Employee Survey: "The level of physical security at my work location is satisfactory."	4 or >	4.3	
8. Employee Survey: "I feel safe from physical injury at my work location."	4 or >	4.6	

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Core Function: Revenue Collections and Compliance

Revenue Collections			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of tax revenues received by electronic transfer	75%	75.0%	
2. Percent of paper filed individual income tax refunds issued within 60 days	90%	96%	
3. Percent of electronically filed individual income tax refunds issued within 14 days	95%	96%	
4. Percent of billed accounts resolved within 180 days	75%	66%	
5. Ratio of costs to collections	10% or <	8.4%	
6. Dollars collected per audit enforcement dollar expended	\$9.00	\$11.13	
Document Processing & Deposit			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of dollars deposited same day as receipt.	85%	87.0%	

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Core Function: Revenue Collections and Compliance

Customer Accounts			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of income tax returns requiring review worked within 60 days of going to review	70%	90%	
2. Percent of local option sales tax and school infrastructure local option sales tax distributed timely each year	95%	95%	
3. Plain Talk: Reduction in phone calls to Customer Account Centers	=< 5,008	3,917	
4. Plain Talk: Rent Reimbursement-Reduction in the total number of claims denied	1,617 or < will be denied.	2,100	
5. Plain Talk: Rent Reimbursement-Percent reduction in claims denied and then reversed	5% or < will be denied and then reversed.	4%	

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Core Function: Revenue Collections and Compliance

Collections			
Accounts Receivables			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of net debt collected within 90 days	40%	28%	New debt has increased dramatically due in part to the recession while collecting from taxpayers has become more difficult.
2. Dollars of debt collected within 90 days	\$46,000,000	\$61,573,770	
Central Collections			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of net debt collected within 210 days	50%	44%	New debt has increased dramatically due in part to the recession. Collecting from taxpayers has also become more difficult.
2. Dollars of debt collected within 210 days	\$58,000,000	\$96,677,078	
3. Dollars recovered for clients	\$48,000,000	\$56,418,900	
Advanced Collections			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of net debt collected within 365 days	65%	53%	New debt has increased dramatically due in part to the recession while collecting from taxpayers has become more difficult.
2. Dollars of debt collected within 365 days	\$75,000,000	\$116,379,198	
3. Plain Talk-Dollars generated divided by total letter sent	Equal to or > \$229	\$241	

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Core Function: Revenue Collections and Compliance

Examination			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Hours spent conducting exams	41,900	48,919	
2. Revenue Established	\$65,000,000	\$142,651,268	
3. Revenue Collected	\$49,800,000	\$57,728,530	
Audit Services			
Instate Field Audit & Compliance			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Revenue Established	\$8,600,000	\$31,397,143	
2. Audit Hours	22,800	22,351	
3. Revenue Collected	\$5,800,000	\$7,806,801	
Investigative Audit			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Revenue Established	\$280,000	\$7,039,609	
2. Audit Hours	3,800	1,601	
3. Revenue Collected	\$190,000	\$359,718	

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Out-of-State Field Audit			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Revenue Established	\$2,100,000	\$5,268,032	
2. Audit Hours	2,500	2,264	
3. Revenue Collected	\$1,000,000	\$419,314	
Tax Gap Program			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Revenue Established	\$34,000,000	\$128,962,084	
2. Audit Hours	14,400	14,728	
3. Revenue Collected	\$17,000,000	\$23,264,096	
Plain Talk			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Total number of examination letters deleted to provide consistency and eliminate redundancy	=> 12	31	
Taxpayer Services			
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Percent of ESU/Taxpayer Services calls dropped	4% or <	3.8%	
2. Percent of ESU/TPS calls answered in one minute	85% or >	83.9%	
3. Percent of ESU/TPS emails answered in one business day	95%	99.9%	

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Core Function: Tax Research and Program Analysis

Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Time required for analysis.	Varies		
Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
1. Time required to complete individual income tax statistical report	March 1 & May 31	March 1st & April 18th	Timely release allowed more time for the Department of Education and school districts to prepare budgets and apply for federal grant money.
2. Time required to complete sales tax statistical report	Published on Web site within one month after receipt of final data file	100%	Some quarterly reports were delayed due to the conversion from COBOL to SAS. The annual report is being changed from one ending with the March 31st quarter to a true fiscal year report.
3. Time to complete monthly receipts and refund reports	End of second business day of the next month	All by the 2nd Day	Timely release of report helps identify factors that influence general fund activity and helps the DOM in preparing its monthly revenue memo.
4. Time required to complete state fiscal impact estimates	Varies	Relevant deadlines met	
5. Federal legislation analysis	Varies	Relevant deadlines met	

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Core Function: Tax Research and Program Analysis

Performance Measure	Performance Target	Performance Actual	Performance Comments & Analysis
6. REC briefing papers	Varies	10 Documents	The effort to develop the quarterly economic indicator papers and econometric forecasting models is a result of feedback from the Revenue Estimating Conference members. A monthly index of Iowa leading economic indicators is now being prepared as a means of allowing REC members and budget officials to better plan for changes to the state's economy.
7. Local option sales tax estimates and school infrastructure local option sales tax estimates	Released by Aug 15	Aug 15	Over \$500 million is sent in estimated payments for LOST and SAVE. These estimates help local governments and school districts to determine money flow for projects.
8. Motor Fuel Retailer Gallonage Report	Released by April 1, 2011	Released April 1st	The information presented in this report is used to gauge the State's success in achieving the goal of replacing 25% of motor fuel consumed in the State with biofuels by 2020.
9. Tax credits program	Quarterly contingent liability reports	Released timely each quarter	These reports provide the basis for making adjustments for tax credits to State revenue estimates.

CURRENT AGENCY CONTACTS

Department Director: Courtney M. Kay-Decker

Division Administrators:

Compliance: Bryce Berg

Internal Services: Jessica Holmes

Policy and Communications: Victoria L. Daniels

Property: Julie Roisen

Revenue Operations: Stuart Vos

Technology & Information Management: Jim Hester

Report Team Leader: Kathy McAninch