

JULY 2022 - JUNE 2023

# ANNUAL REPORT





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Pictured: Spokane, Washington

## VISION

Achieve the highest level of voluntary compliance by being the trusted leader in tax administration and public service.

## MISSION

To efficiently administer tax laws and public service programs with integrity.

## VALUES

Integrity, cooperation, accountability, respect, and excellence.

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# Organizational Overview

## Serving Washington

The Department of Revenue's mission is to efficiently administer tax laws and public service programs with integrity. Headquartered in Tumwater, the agency has field offices statewide in Bellingham, Bothell, Kent, Port Angeles, Richland, Seattle, Spokane, Tacoma, Vancouver, Wenatchee, and Yakima. In addition, the Audit division has 55 out-of-state auditors located in 20 states. The agency's staff of more than 1,300 includes a wide variety of positions such as lawyers, agents, examiners, analysts, appraisers, programmers, foresters, auditors, and support staff.

## Agency responsibilities

As Washington state's primary tax collection agency, the Department of Revenue oversees more than 60 different taxes while collecting more than 93% of the state General Fund tax revenues. A total of \$40.5 billion in state and local taxes was collected in Fiscal

Year 2023. The agency processed 3.1 million tax returns from more than 635,000 businesses filing monthly, quarterly, or annually. It also processed more than 423,000 business license applications and renewals.



## Other responsibilities include:

- Auditing businesses both in-state and out-of-state.
- Enforcing compliance with tax laws.
- Locating unregistered businesses.
- Providing taxpayer assistance, information, and education.
- Overseeing the administration of property tax.
- Managing the state's Unclaimed Property (UCP) program.
- Overseeing the Working Families Tax Credit Program.



# Executive Team

## Drew Shirk, Director

Drew was appointed as the Director of the Department of Revenue in 2023. Prior to his appointment, he served as the Executive Director of Legislative Affairs for Governor Jay Inslee, helping guide the Governor's legislative agenda and managing relations with House and Senate members and leadership. Drew possesses a comprehensive understanding of policy making and strategy as well as strong and extensive stakeholder relationships. Preceding his time with the Governor's Office, Drew served nearly 30 years at Revenue.



## Heidi Geathers, Senior Assistant Director of Administrative Services

Heidi oversees the Information Services, Business and Financial Services, and Human Resources divisions, and Revenue's Information Governance and ATLAS Management programs. Heidi has worked both in the private and public sectors. Before coming to state government, Heidi spent 20 years in the banking industry gaining a keen understanding of customer-centric ideals and practices.



## Alyson Fouts, Senior Assistant Director of Operations

Alyson manages the Audit, Compliance, Property Tax, Taxpayer Services, and Taxpayer Account Administration divisions. Alyson started her career with Revenue in 1990 in the Taxpayer Account Administration division and worked in several policy and operation roles including Program Manager for Interpretations and Technical Advice and Assistant Director of Taxpayer Services.



## John Ryser, Deputy Director

John directs the Customer Experience and Communications and Working Families Tax Credit divisions, as well as Revenue's Lean, Enterprise Risk, and Internal Audit programs. John has a long history with Revenue, starting his career in the Taxpayer Account Administration division and moving on to the Audit division. He has served as Audit's Assistant Director and as the agency's Senior Assistant Director of Operations and Acting Senior Assistant Director of Tax Policy.

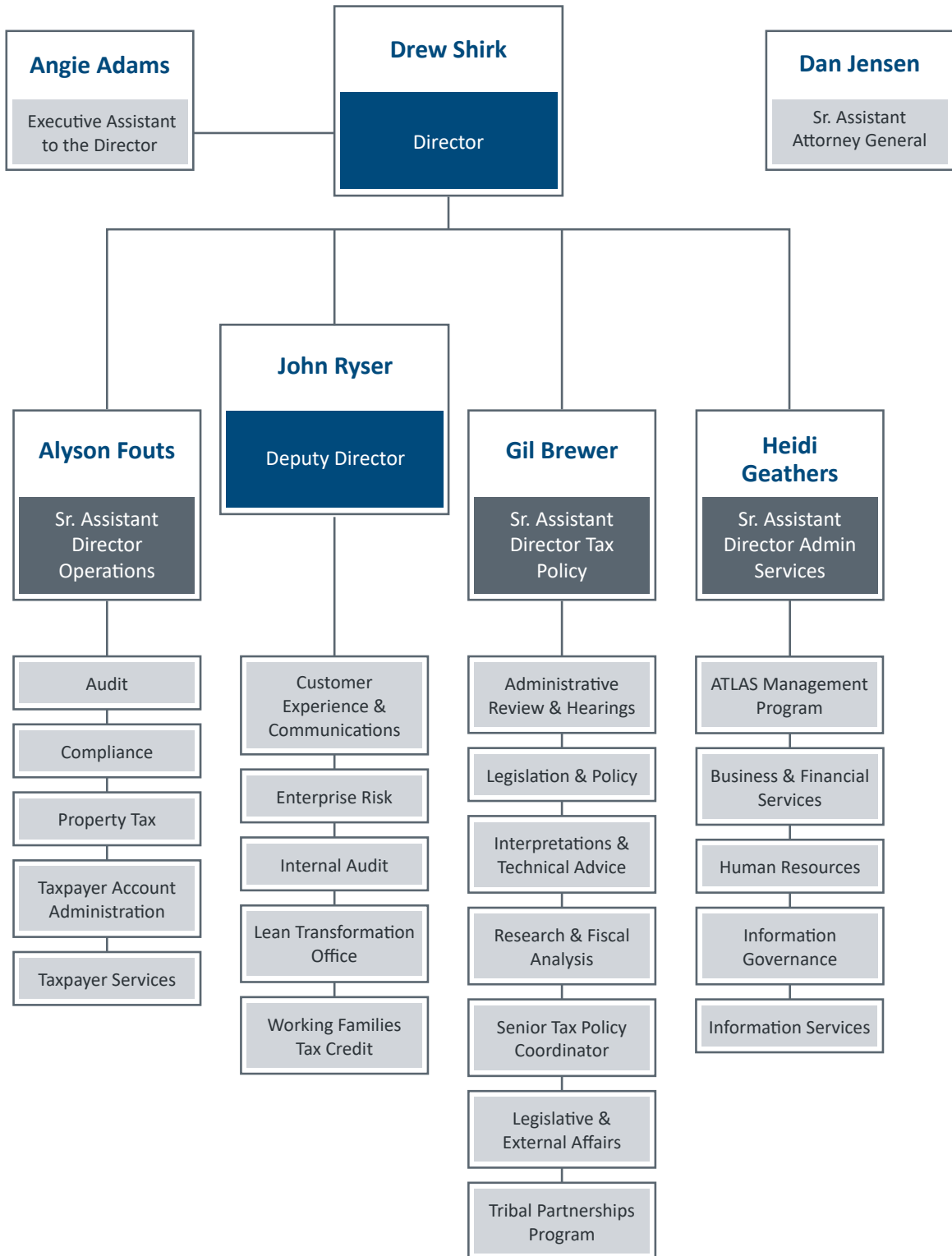


## Gil Brewer, Senior Assistant Director of Tax Policy

Gil oversees the agency's Research and Fiscal Analysis, Interpretations and Technical Advice (ITA), Legislation and Policy, and Administrative Review and Hearings divisions, as well as the department's Tribal Partnerships Program, Legislative and External Affairs programs and is responsible for the development of Revenue's tax policy. Gil has worked for Revenue for more than 20 years and has held various positions, including Tax Policy Specialist, Legislative Liaison, and Assistant Director of the ITA division. He also has more than 15 years of prior policy-related work with governments in Maine, Hawaii and Micronesia.



# Organizational Chart



# Agency Divisions

## Administrative Review & Hearings

**Core duties:** Conducting taxpayer-requested reviews involving tax assessment and refunds, and providing guidance on Washington tax laws.

## Audit

**Core duties:** Promoting voluntary compliance, performing audits, and working with taxpayers on accurate reporting.

## Business & Financial Services

**Core duties:** Providing administrative and financial services to the agency.

## Compliance

**Core duties:** Collecting tax revenues through tax discovery, taxpayer education, field office oversight, investigations, assessments and enforcement.

## Customer Experience & Communications

**Core duties:** Using data to improve customer experience, managing internal and external websites, and public relations.

## Executive

**Core duties:** Overseeing the implementation of the Governor's Executive Orders and Directives, legislative action, government-to-government relations, and statewide enterprise efforts.

## Human Resources

**Core duties:** Providing services to management, employees, and job seekers.

## Information Services

**Core duties:** Providing infrastructure, service support, and IT security.

## Interpretations & Technical Advice

**Core duties:** Developing guidance to ensure fair and consistent application of state tax law; providing policy analysis and technical advice.

## Legislation & Policy

**Core duties:** Supporting the Governor, Legislature, and the agency director in the evaluation of state and local tax programs and policies.

## Property Tax

**Core duties:** Overseeing the administration of property taxes at state and local levels; providing guidance to county assessors and appraising inter-county operating property.

## Research & Fiscal Analysis

**Core duties:** Supporting the Governor and the Legislature by compiling tax data, providing fiscal notes and estimates and analyzing tax and economic impacts of proposed legislation.

## Taxpayer Account Administration

**Core duties:** Administering tax and incentive programs by collecting, accounting for and distributing excise taxes and fees and administering the Uniform Unclaimed Property program.

## Taxpayer Services

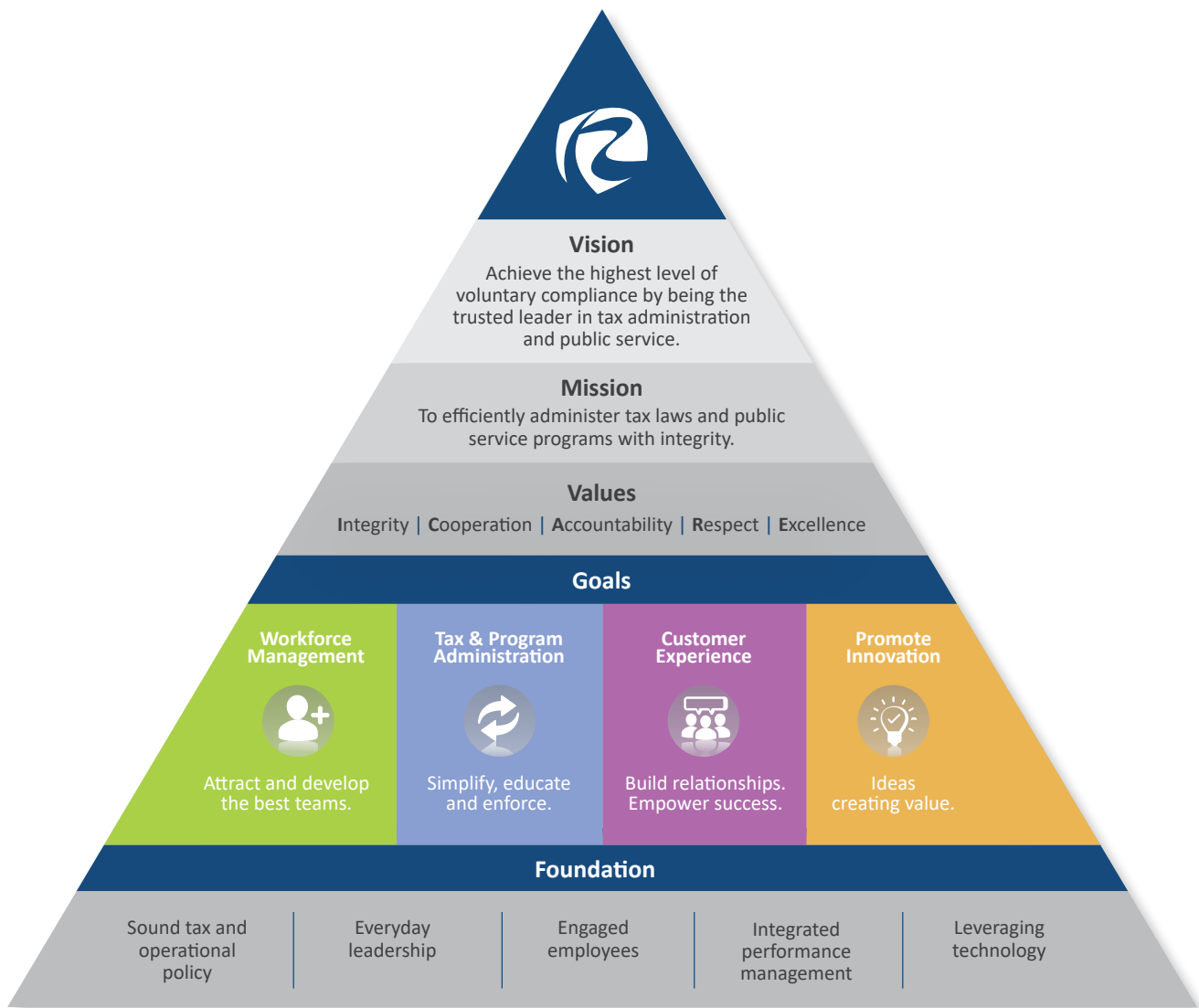
**Core duties:** Managing statewide Business Licensing Services, in-bound call center, taxpayer service program, and taxpayer rights advocate.

## Working Families Tax Credit

**Core duties:** Overseeing a credit program for low-to-moderate income individuals and families who meet eligibility requirements.

# Strategic Pyramid

The Strategic Pyramid communicates Revenue's vision, mission, values, and goals to both staff and customers. It establishes the expectations the agency strives to achieve and the foundational elements that will ensure success. This pyramid is also used to drive the agency strategic business planning process.





# Revenue at a Glance

## Revenue collected (FY23)

### State revenues (in billions):

Retail sales and use tax	\$15.9
Business and occupation	\$6.6
State property tax levy	\$4.5
Other state taxes	\$5.8

### Local revenues:

Retail sales and use tax	\$7.0
Other local revenues	\$0.7

**Total collections** **\$40.5**

Cost per \$100 collected 54¢

## Reporting/active businesses

Active reporting (as of 7/1/2023):

Monthly	170,939
Quarterly	238,129
Annual	226,286
<b>Total</b>	<b>635,354</b>
Audits	4,027
Voluntary compliance	98.2%

## Tax return filings

Monthly	2,022,663
Quarterly	876,794
Annual	200,902
<b>Total</b>	<b>3,100,359</b>

## Staffing

FTEs	1,458.3
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## Agency budget 2021-2023 biennial

FY22	\$192.4M
FY23	\$439.2M
<b>Total</b>	<b>\$631.6M*</b>

\*Increase in FY23 budget includes money allotted for Working Families Tax Credit payments.

## Unclaimed Property

Property reported	\$322M
Claims approved	306,374
<b>Returned to owners</b>	<b>\$138.9M</b>

## Tax revenue collected and what it provides

- \$15.9 billion — State retail sales and use tax
- \$7 billion — Local retail sales and use tax
- \$6.6 billion — Business and occupation tax
- \$5.8 billion — Other state taxes and fees
- \$4.5 billion — State share property tax
- \$0.7 billion — Other local taxes



## Working Families Tax Credit

Applications received	182,300
Individual Tax Identification Number (ITIN) filers	18,230
<b>Total refunded</b>	<b>\$94.7M</b>

## Customer service

**11.1 million** Website visits **350,965** Phone calls

**704** WFTC outreach events **22,829** Live chats

**423,970** Business license applications and renewals **60** Educational workshops (1,529 attendees)

# Working Families exceeds first-year expectations

The Working Families Tax Credit (WFTC) division provided more than \$95.5 million in returns to nearly 133,000 individuals and families in Washington during Fiscal Year 2023.

The program received approximately 182,000 applications, which represents about 45% of estimated eligible recipients. This is an impressive take-up rate in only a short 5-month span of operation and outpaced expectations.



Pictured (left to right): Jenny Sanchez, Jillian Vaderveer, and Stephanie Mora-Elizalde

## Outreach efforts

To develop an equitable program, the WFTC division created and relied on an Outreach Advisory Committee to improve communication channels with individuals applying for the credit. This committee helps identify underserved communities, identifies ways to increase awareness and access to the program, and suggests opportunities for improvement.

More than 37 grass-roots community organizations received grants in the first year of the program to help build relationships and spread the word about the tax credit. Grantees will be another big player in WFTC's second year.

Media outreach—in all its forms—will also continue to help elevate the program. Media campaigns across social media, television, targeted ads, and more, brought more than 810,000 new visitors to the WFTC site, with a 70% engagement rate, indicating people took some kind of action on the page.

## Language support

Spanish was the most requested language in the program's first year and the team is being mindful in their approach to expand and include other languages as the program continues to grow. Other commonly requested languages included Vietnamese, Chinese, Korean, and Khmer.

### In this first year:

- Added more than a dozen certified bilingual staff.
- Made the paper application available in 12 languages, and the MyDOR online application available in Spanish.
- Established language request processes.
- Produced materials and website content in multiple languages.
- Talled more than 400 requests for interpretation or translation.

Now, the teams are focused on the future. Using feedback from staff and stakeholders, WFTC can identify and make changes to the application processing. The goal is to make things as simple as possible for the customer, while streamlining workloads for staff.

# The Unclaimed Property program sets all-time high in returned money

The Department of Revenue administers the state's Unclaimed Property (UCP) program, a free service that reunites property and assets with their rightful owners. In Fiscal Year (FY) 2023, Revenue's UCP program broke records, returning an all-time high of \$138.9 million in unclaimed property back to thousands of Washingtonians.

## What is unclaimed property?

Washington state law requires businesses and other organizations (called holders) to review their records each year to determine whether they hold any funds, securities, or other property that has remained unclaimed for the required abandonment period. Holders file a report annually and transfer the property to the state. Property is usually considered unclaimed after three years, however that time varies based on the type of property.

Revenue acts as a custodian of the reported property indefinitely, until the owner or their heir(s) claims the property. The most common types of unclaimed property include:

- Bank accounts.
- Insurance proceeds.
- Stocks, bonds, and mutual funds.
- Utility and phone company deposits.
- Customer credits.
- Uncashed checks – such as payroll, insurance payments, or travelers' checks.
- Safe deposit box contents.

## Record amounts returned and received

In FY 2023, Revenue's UCP program returned \$138.9 million compared to \$89.4 million in 2022, an almost \$50 million increase in one year.

"It is exciting to see the program continue to grow," Washington's Unclaimed Property Administrator Patti Wilson said. "I started with UCP in 1994. That year, we returned \$4.4 million. Now we return on average over \$11 million per month."

More money was also reported by holders than ever before. Holders reported a record \$322 million in unclaimed property, up more than \$75 million from \$246.5 million the prior year.

## New Money Match program sees positive results

UCP successfully launched the new Money Match program in the Spring of 2023, which automatically returns unclaimed property to Washingtonians after verifying ownership and without requiring an owner to file a claim or submit documentation. Since the new program launched, UCP has issued 9,104 checks for a total of \$1.2 million.

"Returning money to rightful owners is the best job in state government," Wilson said. "It is especially great when we return money to individuals who did not know they had money coming to them."

## Safe Deposit Auction

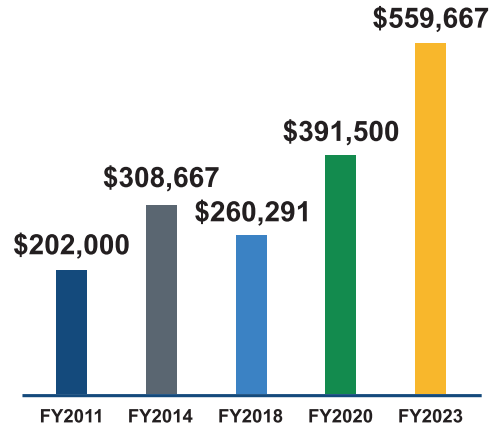
The department holds a safe deposit box auction every two to four years, depending on the volume of





100 oz troy ounce silver bars selling for \$2,100 each. The owners or heirs may come forward at any time to claim the proceeds held by the department.

### Safe deposit box auction proceeds



deposit box items received. In November 2022, Revenue held a very successful safe deposit box auction with two years of inventory. The auction gross proceeds were \$559,667, which included 505 abandoned boxes. Popular items were an 1860 Lincoln campaign button which sold for \$1,201, a diamond ring that sold for \$15,000, and thirteen

## Implementing the Capital Gains Tax

In 2021, the Legislature passed ESSB 5096 enacting the capital gains excise tax. The new tax created a 7% tax on the sale or exchange of long-term capital assets such as stocks and bonds, business interests, or a work of art, if the profits exceed \$250,000 annually. The tax took effect on Jan. 1, 2022, and the first payments were due on or before April 18, 2023.

### Program development and challenges

To administer the tax, Revenue created a new online tax filing form that was tested with customers for usability. The program provided outreach and education online and in-person for internal staff, business groups, tax practitioners, and the public.

During the implementation phase, the constitutionality of the tax was challenged in county Superior Court and was initially ruled unconstitutional. The state appealed the decision and was granted a stay. While waiting for the Supreme Court's decision, Revenue had to proceed with administering the program and plan for two possible outcomes, doubling the workload.

Ultimately the state Supreme Court ruled the tax constitutional in early 2023 before the April 18 due date.

### Successful outcome and funding for school accounts

As of the date of this report, more than 8,000 capital gains accounts have been registered, receiving over 4,200 payments in excess of \$889 million. The revenue collected from this tax will help fund the education legacy trust account and common school construction account.



# Integrity leads the way for Revenue's new Assistant Attorney General

Often a job you excel in paves the way for a job that highlights those skills even more. That's certainly the case for Dan Jensen, Senior Assistant Attorney General. After 16 years with the Department of Revenue, Dan stepped into his new role as Revenue and Finance Division Chief at the Office of the Attorney General (AGO) on May 15, 2023.

He follows Cam Comfort, who retired after nearly 33 years representing Revenue. "Cam's leadership guided us through many significant cases," said Dan. "I feel fortunate to continue that legacy."

Dan most recently served as the Assistant Director of the Administrative Revenue and Hearings Division at Revenue and continues to sit on Revenue's leadership team. Colleagues have described Dan as engaged, and one who helps lead strategic vision for the agency.

As the Division Chief for Revenue and Finance at the AGO, Dan oversees legal services to the Department of Revenue, among other agencies, boards, and commissions. The division's range of legal work is broad, challenging, and complex, encompassing most aspects of state government operations involving finance.

Many cases handled by this division have a significant impact for the state and often find their way to the Washington Court of Appeals or Supreme Court.

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*"It's really important to have a client like Revenue that is so supportive and ensures we have all the information we need to get through challenging legal issues," said Dan. "We have to litigate some complicated cases, and together we do it with integrity and with our best foot forward."*

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Pictured: Dan Jensen, Senior Assistant Attorney General.

The partnership between Revenue and the AGO is one that's highly regarded, he continued. "As long as I've been here, there's always been a cohesive, open relationship between the two agencies."

During his time at Revenue, Dan also served as administrative review manager, policy and operations manager, tax review officer, and did a one-year rotation to the Attorney General's Office.

Before coming to Washington, Dan worked for the Arizona Department of Revenue. Dan has spent most of his legal career working in state and local taxation, doing everything from drafting rules and legislation to managing Revenue's internal appeals functions.

# Tribal Relations

Revenue remains committed to strengthening its government-to-government relationships with Tribal Nations by dedicating staff and resources to work with Tribes, Tribal citizens, Tribal businesses, and others doing business in Indian Country.

The agency continues to strive for timely responses and rulings to inquiries from these Tribal partners.

To continue direct engagement with Tribal leaders, the Tribal Tax Advisory Group has subgroups that work on specific areas of relationship building and taxation with the region's Tribes.

## Fiscal Year 2023 Highlights

Tribal Relations continued to educate and share information with businesses regarding the fishing, hunting, and gathering exemption. (This is an extension of the Fishing, Hunting, and Gathering Consultation that concluded in 2022.) This included responding to several Tribes' requests for education in specific areas and creating materials customized for retailers. In certain cases, the department visited retailers to educate and answer questions.



Revenue met with Tribal leaders and staff of the Quinault Indian Nation to discuss implementing SHB 1711 (2023), which provides a state sales and use tax exemption related to internet and telecommunications infrastructure projects that involve a federally recognized Tribe.

Additionally, Tribal Relations created educational materials for contractors working on the project.

Notably, the program worked with several Tribes to update Revenue's tax rate lookup tool with the boundaries of their respective federal trust properties.



As a result, businesses should know that purchases by Tribal Governments, tribal entities, and tribal citizens with delivery to these trust properties in their own Indian country do not owe tax.

Revenue received and processed property tax exemption applications from Tribal Governments for more than 300 parcels, which is over a 200% increase from previous years. Tribal Relations also assisted some Tribes in connecting with county officials to help educate them on Tribal exemptions.

Additionally, the department continued cigarette compact meetings with Tribes. Revenue also entered into two additional retail taxes compacts with Tribes during the fiscal year.

# Supporting the Legislature

By statute, Revenue is tasked with providing vital non-partisan support to lawmakers with feedback and fiscal estimates, technical advice, analysis, and data.

Two of the agency's divisions, Legislation and Policy (L&P) and Research and Fiscal Analysis (RFA) are most involved with these efforts.

L&P helps the Governor's Office, Legislature, and other stakeholders draft bills and provides feedback on technical and policy issues.

The division also tracks and analyzes bills to understand the impact on the agency's tax, licensing, and public service programs.

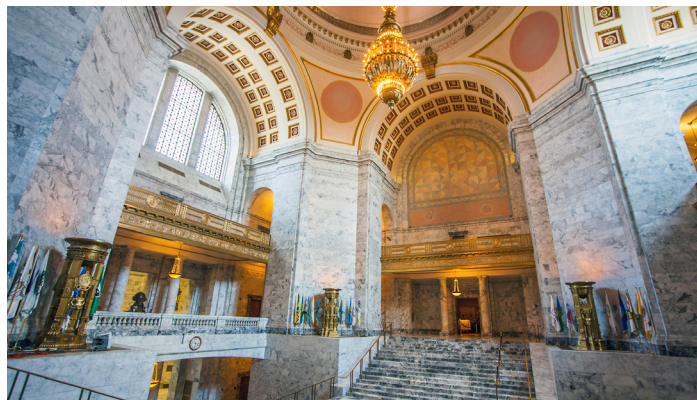
RFA analyzes tax and economic impacts, coordinates fiscal notes, compiles data, and prepares fiscal estimates primarily using tax and economic models that require annual updates.

## The 2023 Legislative Session

Four of Revenue's request legislation were successfully adopted into law:

### SSB 5565

Modified tax and revenue laws by making technical corrections, clarifying ambiguities, easing compliance burdens for taxpayers, and providing administrative efficiencies.



### SHB 1254

Amended statutes with unclear or outdated references to an inflation or price index.

### HB 1303

Converted informal Board of Tax Appeals (BTA) property tax appeals to formal appeals and clarified the valuation date for government-owned property losing exempt status and certain property tax levy calculations.

### HB 1742

Made technical corrections and reinstated certain provisions inadvertently omitted from the 2022 Unclaimed Property (UCP) legislation. It also provided a 24-month late penalty/fee waiver for UCP holders and business licensees.



**561**  
bills analyzed.



**786**  
amendments analyzed.



**445**  
fiscal notes completed.



**304**  
fiscal estimates completed.



**98%**  
fiscal estimates delivered by the due date.

# Employee Resource Groups expand their reach at Revenue

When employees feel belonging and support at work, their customers end up feeling it, too. At Revenue, the Inclusion, Diversity, Equity Committee (IDEC) has played a role in shaping agency culture, as has the Veteran Employment Team.

As part of Revenue’s Strategic Business Plan, developing more Employee Resource Groups (ERGs) has been a priority for the agency. An ERG workgroup led a discovery campaign to help propose the next ERGs at Revenue. Based on these findings, IDEC members and executive leadership moved forward with creating the agency’s first ERG for people of Hawaiian, Asian, and Pacific Islander descent.

## Employee leads and co-leads identified goals for the new ERG to include the following:

- Foster a sense of inclusion and belonging within the Hawaiian, Asian, and Pacific Islander community that gives voice to their experiences.

- Promote recruitment and retention of this community.
- Formulate recommendations to improve the employee experience for this community.

“I believe that our ERGs will help elevate voices that will speak to barriers our agency has unintentionally created for our employees,” said Diversity, Equity, Inclusion and Respect Manager Joanna Falcatan.

## Additional DEI Fiscal Year 2023 highlights:

- Continued to track the agency’s diversity, equity, and inclusion efforts.
- Raised the inaugural Juneteenth flag at Revenue’s main campus.
- Creation of the agency’s first Pro-Equity Anti-Racism Strategic Plan per Executive Order 22-04.

# Revenue’s PEAR team: supporting the mission, sharing the message

Executive Order 22-04, Implementing the Washington State Pro-Equity Anti-Racism (PEAR) Plan & Playbook took effect March 21, 2022. The Executive Order supports all cabinet agencies in developing a PEAR Strategic Action Plan.

## Since then, Revenue’s PEAR team has worked hard on the agency’s first three PEAR lines of investment:

- Build a team to include community partners with lived experience.
- Support language access efforts.
- Explore an Equity Impact Review for the agency.



To help share Revenue’s PEAR mission both internally and externally, Customer Experience and Communications worked with Revenue’s PEAR team members to create a 4-minute video.



"The video will help us to reach members of our community by showing how we are a part of the community and how every perspective matters," said Revenue's Perry Stern, who is featured in the video. "We each went into filming and approached the project from our own perspective. The final product

is a tapestry of our stories and shows how important varied experiences are, and how we make up this one great community."

The video is now live on dor.wa.gov and subtitles are available in six different languages.

## Language access is a priority

The language access strategic initiative gained significant momentum in FY 23. This initiative supports the strategic priorities to strengthen trust and accountability and reduce the burden on customers by considering their needs. In addition, it supports the Revenue goal of building relationships and empowering success and is one of the three service lines investments of Revenue's Pro-Equity, Anti-Racism (PEAR) plan.

The bulk of this work was and is creating and implementing Revenue's first Language Access Plan. This roadmap serves as a strategic guide, outlining action items to improve the language access program.



### Action items support the following areas:

- Enhancing the customer experience for Limited English Proficiency (LEP) individuals.
- Ensuring quality assurance in language access efforts.
- Improving staff training and awareness on language services.
- Increasing visibility of services on the website and in public spaces.
- Establishing a framework for continuous improvement in language access.



### My preferred language is...

DOR provides free interpretation and translation services. Point to your language to get help.

<input type="checkbox"/> <b>Amharic</b>	DOR provides free interpretation and translation services for Amharic speakers.	<input type="checkbox"/> <b>Portuguese (Brazil)</b>	DOR provides free interpretation and translation services for Portuguese (Brazil) speakers.
<input type="checkbox"/> <b>Arabic</b>	DOR provides free interpretation and translation services for Arabic speakers.	<input type="checkbox"/> <b>Portuguese (Portugal)</b>	DOR provides free interpretation and translation services for Portuguese (Portugal) speakers.
<input type="checkbox"/> <b>Mandarin Chinese (Simplified)</b>	DOR provides free interpretation and translation services for Mandarin Chinese (Simplified) speakers.	<input type="checkbox"/> <b>Punjabi</b>	DOR provides free interpretation and translation services for Punjabi speakers.
<input type="checkbox"/> <b>Mandarin Chinese (Traditional)</b>	DOR provides free interpretation and translation services for Mandarin Chinese (Traditional) speakers.	<input type="checkbox"/> <b>Romanian</b>	DOR provides free interpretation and translation services for Romanian speakers.
<input type="checkbox"/> <b>Cantonese Chinese</b>	DOR provides free interpretation and translation services for Cantonese Chinese speakers.	<input type="checkbox"/> <b>Russian</b>	DOR provides free interpretation and translation services for Russian speakers.
<input type="checkbox"/> <b>Dari</b>	DOR provides free interpretation and translation services for Dari speakers.	<input type="checkbox"/> <b>Samoan</b>	DOR provides free interpretation and translation services for Samoan speakers.
<input type="checkbox"/> <b>Farsi</b>	DOR provides free interpretation and translation services for Farsi speakers.	<input type="checkbox"/> <b>Somali</b>	DOR provides free interpretation and translation services for Somali speakers.
<input type="checkbox"/> <b>French</b>	DOR offers des services gratuits d'interprétation et de traduction. Touchez ou pointez votre langue préférée en français.	<input type="checkbox"/> <b>Spanish</b>	El DOR ofrece servicios gratuitos de interpretación y traducción. Señale o toque su idioma preferido en español.
<input type="checkbox"/> <b>Hindi</b>	DOR provides free interpretation and translation services for Hindi speakers.	<input type="checkbox"/> <b>Swahili</b>	DOR provides free interpretation and translation services for Swahili speakers.
<input type="checkbox"/> <b>Japanese</b>	DOR provides free interpretation and translation services for Japanese speakers.	<input type="checkbox"/> <b>Tagalog</b>	DOR provides free interpretation and translation services for Tagalog speakers.
<input type="checkbox"/> <b>Khmer</b>	DOR provides free interpretation and translation services for Khmer speakers.	<input type="checkbox"/> <b>Tamil</b>	DOR provides free interpretation and translation services for Tamil speakers.
<input type="checkbox"/> <b>Korean</b>	DOR provides free interpretation and translation services for Korean speakers.	<input type="checkbox"/> <b>Telugu</b>	DOR provides free interpretation and translation services for Telugu speakers.
<input type="checkbox"/> <b>Lao</b>	DOR provides free interpretation and translation services for Lao speakers.	<input type="checkbox"/> <b>Thai</b>	DOR provides free interpretation and translation services for Thai speakers.
<input type="checkbox"/> <b>Marshallese</b>	DOR provides free interpretation and translation services for Marshallese speakers.	<input type="checkbox"/> <b>Tigrinya</b>	DOR provides free interpretation and translation services for Tigrinya speakers.
<input type="checkbox"/> <b>Nepali</b>	DOR provides free interpretation and translation services for Nepali speakers.	<input type="checkbox"/> <b>Ukrainian</b>	DOR provides free interpretation and translation services for Ukrainian speakers.
<input type="checkbox"/> <b>Oromo</b>	DOR provides free interpretation and translation services for Oromo speakers.	<input type="checkbox"/> <b>Urdu</b>	DOR provides free interpretation and translation services for Urdu speakers.
<input type="checkbox"/> <b>Pashto</b>	DOR provides free interpretation and translation services for Pashto speakers.	<input type="checkbox"/> <b>Vietnamese</b>	DOR provides free interpretation and translation services for Vietnamese speakers.

Since starting this initiative, Revenue has already experienced positive outcomes. Over 70% of action items have been completed, with the remaining to be finished by July 2024. Moving forward, Revenue remains committed to breaking down language barriers and fostering a more inclusive environment for all.

# You're hired! Revenue wins award for improving recruitment tactics

Revenue earned the spotlight from the Federation of Tax Administrators (FTA), receiving the 2023 Award for Innovation and Excellence in Tax Administration.

The winning project was "Leading with Data: Enterprise Recruitment and Retention Tactics for Today." The agency and Human Resources division takes pride in this accomplishment, with special accolades to the staffing team: Manager Chuck Johnson and staffing experts Lance Proctor and Patrick Suttan.

"Our volumes have been high, and the work has changed so much," shared Lance, senior staffing consultant. "But to work with people you trust, who know you and your capabilities, respect you, and share your values, makes it so much easier to take on challenging tasks and find success."



Pictured: DOR recruitment video.

Some of those challenges include external forces such as the pandemic and resulting changed recruitment landscape and competition with other state agencies.

One approach the staffing team took was to use data-driven decisions to work with hiring managers and others across the agency to re-imagine position descriptions and qualifications.

They also discovered new ways to develop employees for promotional opportunities, and to network with new communities.

## Results from those efforts include:

- Filling 409 positions, over 150 more than any year prior.
- Developing and delivering 24 Mitigating Implicit Bias in the Hiring Process trainings, training 359 managers, supervisors, and panel members.
- Filling 49.9% of positions with promotions.
- Hiring managers reporting increased confidence in the hiring process.
- Enhancing outreach practices to focus on diverse hiring. This resulted in some of the most diverse hiring rates in state government:
  - 41.5% of DOR new hires identify as a person of color, almost double the statewide average.
  - 14.1% of DOR new hires are Veterans, more than double the Governor's goal for state agencies.
  - 6.3% of DOR new hires identify as a person with a disability, pushing overall agency representation to 5.2%, making Revenue one of few agencies exceeding the Governor's goal of 5%, more significantly doubling the rate maintained just a few years ago.

# Revenue leader Heidi Geathers celebrated for pandemic response

Revenue's Senior Assistant Director of Administrative Services, Heidi Geathers, was honored as a recipient of the 2022 Governor's Outstanding Leadership Award (GOLA). At the time, Heidi was serving as acting deputy director.

## COVID-19 Leadership

Heidi oversees Information Services, Business and Financial Services, Human Resources divisions, and the Information Governance and ATLAS Management programs.

Known as a highly respected leader with a keen understanding of customer-centric practices, Heidi was recognized for expertly directing the agency's response to the COVID-19 pandemic.

Throughout the pandemic, Heidi's commitment to Revenue's employees and vital business functions remained steadfast. Because Heidi ensured the agency had the operational infrastructure to continue business, Revenue was able to focus on two key areas:

## Health and safety of employees

Heidi led Revenue's efforts for a hybrid work environment while enacting important safety



Pictured: Heidi Geathers and other agency winners celebrating with Governor Jay Inslee at the GOLA ceremony.



Pictured: Heidi Geathers, Senior Assistant Director of Administrative Services.

protocols. She championed the acceleration and use of video conferencing, virtual meeting management, virtual training, and employee engagement.

Pulse survey results showed that 81% of respondents did "Great" with teleworking during the pandemic. These tactics are still in use today, with even greater satisfaction results from employees.

## Results for the public

With staff equipped for remote work, Revenue closed all offices to the public in March 2020. All services for customers remained available online or by telephone. Revenue was able to offer several relief options to businesses impacted by the pandemic.

*"I am fortunate to be mentored by extraordinary leaders and hope I provide that for others, giving encouragement and building confidence to succeed," Heidi said.*

# Executive dashboard brings performance measures to the forefront

A new executive dashboard pulls together 21 performance measures into one place, Power BI, allowing leadership to track and define the agency's performance more accurately.

Another change is that performance measures are now categorized by strategic goal, rather than individual divisions. While there is still the capability to drill into data, this new framework allows for a more holistic and collaborative view. Previously, reports needed to be pulled manually.

The dashboard was a result of a performance measure Lean workshop and has been well-received by the executive leadership team.

*“Having the dashboard data all in one place makes it easier to use, visualize, and dive deeper to get a better understanding of what the data is telling us,” said Senior Assistant Director of Administrative Services Heidi Geathers.*

The dashboard is also available to anyone in the agency, providing transparency and a way for employees to feel more connected to the work they do.

## Lean Belt Program continues to thrive

Revenue continues to have a thriving Lean Belt program to include Yellow, Green, and Blue Belts. Employees who earn Lean belts are champions for the Lean culture and continuous improvement. They have taken the required courses and have demonstrated use of their skills to improve their work, grow their leadership skills, or facilitate a full process improvement effort.



**New Yellow Belts: 16**

**Total Yellow Belts: 100**



**New Green Belts: 13**

**Total Green Belts: 37**



**Total Blue Belts: 8**

### Green Belts facilitated seven process improvements:

- Unclaimed Property Holder Reconciliation
- Property Tax Education Program
- Performance Measure Reporting
- Washington Tax Determination Inventory Review
- Legislative Staff and Sponsor Letter
- Agency Policies and Procedures
- New Auditor Training Content Maintenance

Revenue Green Belts also helped facilitate Yellow Belt classes and participated in teach backs at the quarterly Lean Community of Practice.

### Data Driven Decisions

Revenue finished the second annual data driven decisions maturity assessment. The assessment measures how the agency is maturing in use of data, awareness, training, tools, and culture.

## Revenue has improved these measures through the following:

- Launching data visualization and decision maker training.
- Supporting divisions to adopt Power BI.
- Revenue Leadership Team meeting six times a year to discuss agency performance.

- Improving the Executive Dashboard by putting it into Power BI, making it interactive, and simpler to maintain and update.
- Improving performance measures in five divisions to make the measures more meaningful, allowing the divisions to make more informed data-driven decisions.

# Strength in numbers: Revenue gives back to Washington charities

Revenue has always been a strong supporter of the Washington State Combined Fund Drive (CFD). This workplace giving program offers a free and convenient way for current and retired state workers to support more than 4,700 CFD member charities and make a difference in the lives of thousands of people in need.

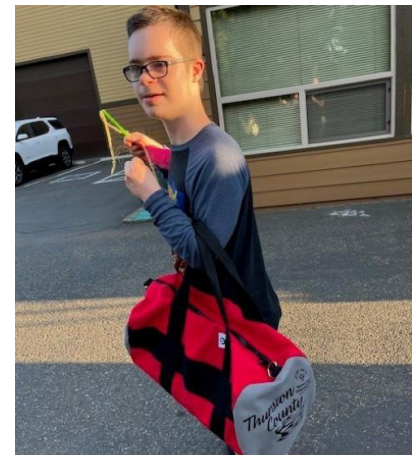
A highlight of 2023 fundraising was the Property Tax Division Charity Fair, a virtual event, featuring six charities, including the Thurston County Inclusion program. This program brings youth with and without intellectual disabilities together for year round engagement in order to support peer connections and relationships.



Each year, Revenue highlights a six-week CFD fundraising campaign encouraging its employees to support the CFD and charities however they can. Employees are encouraged to pledge their ongoing support to charities of their choice with a monthly payroll deduction or donate their time to an organization or cause.

To add plenty of “fun” in “fun-draising,” a dedicated group of agency campaign coordinators volunteer their time and efforts to educating staff about various charities and organizing engaging in-person and virtual events. Employees look forward to these fundraising events, including trivia contests, chili and baking “cook-offs,” photo contests and more.

Pictured: Sam Tassoni, one of many who benefit from the CFD and Thurston County Inclusion Program. Sam is the son of employee Wendy Lagerquist, who organized the Property Tax Division Charity Fair.



## During Revenue’s 2023 CFD campaign:

- \$61,735 – Amount pledged to charities.
- 35% – Agency participation in CFD giving.
- 35 – Volunteer hours donated.

Earlier this year, the Combined Fund Drive honored Revenue for having the highest participation rate of all large state agencies (500+ employees) during the 2022 CFD campaign.

# Videos and volunteering: VET shines at Revenue

Walter Tanimoto made the decision to retire from his position as an Army Captain in 2007, moving into a management analyst position at the Department of Revenue. But he didn't leave his military service behind. In fact, he's integrated it into his work as a public servant.



Pictured: Walter Tanimoto at Memorial Day event with Nisei Veterans in 2023.

"I chose a whole different path, transitioning wasn't easy," shared Walt, who is an active member of the Veterans Employment Team (VET) employee resource group at Revenue.

For Walt, and many others, transition support is crucial.

"It has a huge impact on veterans, just being able to talk to someone," said Walt. "We have shared experiences. We know both the military and Revenue. We can help each other and tell a lot of stories – it creates a fun group of people to be around."

## Videos provide visibility

Some of that storytelling is also shared with the rest of the agency. The VET honors the service branch birthdays, as well as Veterans Day and Memorial Day, through a video series that highlights the experiences of agency veterans. The videos began as a response to the pandemic but continue to make an impact in Revenue's telework environment.

"We can reach a wider audience," explained Walt, who helps produce the videos. "Employees who see the videos probably have friends or family who have served. It actually helps us show that we have awareness of veterans' issues – it's a great tool."

Additional VET support includes virtual monthly meetings, guest speakers, resource-sharing, and volunteer opportunities.

## Giving back

For the past five years, the VET team has organized a March Madness fundraiser to benefit Puget Sound Honor Flight. This local nonprofit chapter transports veterans who served in World War II, the Korean War, and the Vietnam War back to Washington, D.C. for "one last mission" – to visit and reflect at the memorials built in their honor. Revenue's running total for donations is \$6,546, meaning eight veterans have been honored by the VET members' efforts.

"It's just one of those things we try to do," says Walt. "We help veterans where we can."

Statewide, the availability of transitioning veterans is decreasing, but Revenue is keeping up with the veteran hiring goal across Washington, which is 7% of the workforce. At Revenue in FY23, 92 people self-reported their veteran status. The Revenue recruitment teams continues their outreach and preferred employer status to the veteran community.





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