OREGON COUNTS ON US

ADOPTED STRATEGIC PLAN | 2022-2027

Oregon Department of Revenue
Updated January 2024

OREGON
DEPARTMENT
OF REVENUE

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Land Recognition

We would like to acknowledge the many tribes and bands who call Oregon their ancestral territory, including: Burns Paiute, Confederated Tribes of Coos, Lower Umpqua and Siuslaw, Confederated Tribes of Cow Creek Lower Band of Umpqua, Confederated Tribes of Grand Ronde, Confederated Tribes of Siletz Indians, Confederated Tribes of Warm Springs, Confederated Tribes of Umatilla Indian Reservation, Coquille Tribe, and Klamath Tribes; and honor the ongoing relationship between the land, plants, animals, and people indigenous to this place we now call Oregon. We recognize the continued sovereignty of the nine federally recognized tribes who have ties to this place and thank them for continuing to teach us how we might all be here together, and we continue to strive to work on a government-to-government basis with the nine federally recognized tribes.

Message from Director Betsy Imholt

Dear Oregonians,

The 2022-2027 Oregon Department of Revenue Strategic Plan maps out a course of action for the agency that commits to racial equity, improves our customers' experience, supports our employees, and leverages our data.

Informed by robust customer, external partner, and staff insights, along with comprehensive analysis of environmental factors, the plan identifies four priorities for the Oregon Department of Revenue. These priorities focus on ensuring dignity and inclusion for all, making it simpler to work with us, training and preparing our workforce for the future, and enhancing data access and use. Through this plan, the Oregon Department of Revenue is positioned to enhance its role as the agency that Oregon counts on for revenue.

Development of the 2022-2027 Oregon Department of Revenue Strategic Plan is an initial step. Agency action and implementation of the plan will eventually drive its impact. The plan will inform agency initiatives, programs, plans, budget decisions, and policy considerations. We know outcomes of our work will not be achieved alone.

Embedded in this strategic plan is the acknowledgment that partnerships will be more important than ever if we are going to address the needs of our customers and continue to bring in the revenue that Oregon counts on. We are committed to working with our customers, partners, and local communities across Oregon to fullfill our mission and realize our vision.

We look forward to the work ahead.

Betsy Imholt

Director
Oregon Department of Revenue

Acknowledgments

This plan is the result of many individuals and organizations engaging with the Oregon Department of Revenue as we gathered insights and created forward-looking strategies to drive the agency's priorities over the next six years. We could not have completed this strategic plan without our staff, our partners, and our customers who all contributed their voice and insight. There are many acknowledgments to go around, but in particular, we would like to thank:

Oregon Department of Revenue Leaders

Betsy Imholt, Director
Satish Upadhyay, Deputy Director
Bram Ekstrand, Property Tax Division Administrator
Deanna Mack, Collection Division Administrator
Jay Messenger, Internal Controls Officer
Joanna Robert, Communications Director
Katie Lolley, Business Division Administrator
Katie McCann, Policy Assistant
Kathy Terman, Chief Information Officer
Katie Thiel, Human Resources Director
Marjorie Taylor, Legislative Director
Megan Denison, Personal Tax and Compliance Division Administrator
Stefan Hamlin, Chief Financial Officer
Timothy Fitzgerald, Research Director

2021 External Workshop Attendees

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Riley Eldridge, CASH Oregon
Patrick Heath, Department of Administrative Services
Carolina Marquette, Department of Consumer and Business Services
Zane Potter, Legislative Fiscal Office
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Jim Verrastro, Oregon Association of Tax Consultants
Kevin Christiansen, Oregon Bankers Association
Jesse Bontecou, Oregon Retailers of Cannabis Association
Scot Langton, Deschutes County Assessor
Derrick Wharff, Oregon State Association of County Assessors
Nikki Dobay, Oregon State Bar—Tax Section
Jody Wiser, Tax Fairness Oregon

2023 External Workshop Attendees

Brian Nava, Association of Oregon Counties
Riley Eldridge, CASH Oregon
Wendy Gibson, Department of Administrative Services
Doris Olivan, Department of Consumer and Business Services
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Tei-Onna Haggard, Oregon Association of Minority Entrepreneurs
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Jeannine Beatrice, Oregon Employment Department
Adam Abplanalp, Oregon Society of Certified Public Accountants
Harriet Strothers, Oregon Society of Certified Public Accountants
Nathan Bigby, Oregon State Association of County Assessors
Catherine Mary Schulist, Oregon State Bar
Bennett Minton, Tax Fairness Oregon

Thank you to the strategic planning coordinator, Jessica Millett, and to all the organizations and individuals across the state who participated in interviews, workshops, and surveys as part of this process. Your input was incredibly valuable and appreciated.

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We are committed to bringing in the revenue that Oregon counts on.

Oregon tax dollars pay for the infrastructure of our daily lives, of our loved ones' lives, and the critical support systems for Oregon's most vulnerable.

We administer 63 revenue streams that support bringing in money for Oregon.

We provide services for the general public, tax professionals, cities, counties, local taxing districts, and other state agencies.

Strategic planning is critical to the effectiveness of any organization. It enables an agency to establish goals, prioritize initiatives, measure progress, and carefully allocate limited time, resources, and attention.

The Oregon Legislature creates the tax laws that we administer and determines what happens to the revenue after it is collected, including who receives it and what they do with it.

Oregonians can participate in the legislative process through getting involved with their local legislators and participating in legislative sessions.

OUR STORY

Who is the Oregon Department of Revenue?

The Oregon Department of Revenue administers Oregon tax laws, supports partners' programs, and acts as a central debt collection agency for other state agencies, boards, commissions, and local governments. We provide services for the general public, tax professionals, cities, counties, local taxing districts, tribal governments, and other state agencies.

Mission
Together, we collect the revenue that Oregon counts on.

Vision
To create a clear and easy experience for our customers.

Values
- We work to earn the trust of taxpayers.
- We seek dignity and inclusion for all.
- We do the right thing.
- We build partnerships.
- We rise to the occasion.

The Oregon Department of Revenue is headquartered in Salem, with five field offices in Bend, Eugene, Medford, Portland, and Gresham. We also have a remote call center in Fossil.

We are committed to bringing in the revenue that Oregon counts on, whether, it's through tax programs we administer, supporting our partners' revenue collection efforts, or collecting on debts owed the state of Oregon. Our mission, vision, and values define our purpose and guide our work.

The department processed approximately $34 billion in payments during the 2019-21 biennium. We also supported our local partners generating an additional $15 billion in revenues.
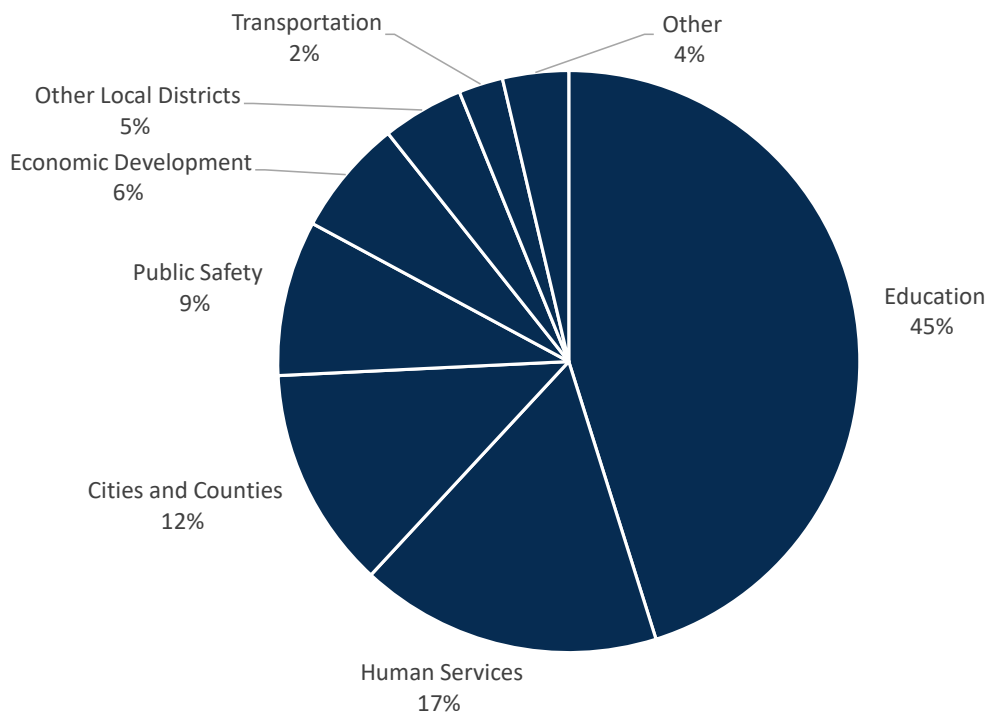
What happens to the money?

Oregon tax dollars pay for services such as:

- K-12 education
- Early learning services
- Community colleges
- Higher education
- Medicaid
- Food benefits
- Senior services
- Mental health services
- Child protective services
- Hospitals
- Police
- Fire

- Department of Justice
- Corrections facilities
- Juvenile corrections
- Highways
- Transit programs
- Forestry services
- Library services
- Agriculture
- Sewer systems
- Parks
- Environmental quality

Oregon tax dollars pay for the infrastructure of our daily lives, of our loved ones' lives, and the critical support systems for Oregon's most vulnerable. The Oregon Legislature creates the tax laws that we administer and determines what happens to the revenue after it is collected, including who receives it and what they do with it. Oregonians can participate in this process through getting involved with their local legislators and participating in legislative sessions.

For example, after refunds were made to taxpayers, 2021 fiscal year revenue that we processed and our local partners processed funded the following services.

Transportation 2%
Other 4%
Other Local Districts 5%
Economic Development 6%
Public Safety 9%
Education 45%
Cities and Counties 12%
Human Services 17%

Our Programs

We administer 63 revenue streams that support bringing in money for Oregon. That includes 38 tax programs, 11 fee programs, and 14 other programs.

Taxes

- Amusement Device Tax
- Bicycle Excise Tax
- Cigarette Tax
- 988 Coordinated Crisis Service Tax
- Corporate Activity Tax
- Corporation Excise Tax
- Corporation Income Tax
- Emergency Communications Tax (E-911)
- Estate Transfer Tax
- Fiduciary Income Tax
- Forest Products Harvest Tax
- Heavy Equipment Rental Tax (HERT)
- Lane Transit District Payroll Tax
- Lane Transit District Self-Employment Tax
- Local Marijuana Retail Tax
- Local Transient Lodging Tax
- Mutual and Cooperative Electric Distribution Systems Tax
- Oil and Gas Production Tax
- Paid Leave Oregon
- Partnership Privilege Tax
- Pass-Through Entity Elective Tax (PTE-E)
- Personal Income Tax
- Personal Income Tax Withholding
- Private Rail Car Tax
- Property Tax, Industrial Valuation, and Assessment
- Psilocybin Tax
- Small Tract Severance Tax – Eastern
- Small Tract Severance Tax – Western
- State Marijuana Retail Tax
- State Transient Lodging Tax
- Statewide Transit Tax
- Tobacco Products Tax
- TriMet Transit District Payroll Tax
- TriMet Transit District Self-Employment Tax
- Unemployment Insurance Tax
- Vehicle Privilege Tax
- Vehicle Use Tax
- Workers Compensation

Fees

- Assessment and Taxation Map Maintenance
- Assistance Program (CAFFA)
- Criminal Fines and Assessments
- Hazardous Substance Possession Fee
- Kratom Processor Registration
- Loaded Tank Railroad Car Fee
- Oregon Food Processors Fee
- Oregon Housing
- ORMap
- Petroleum Load Fee
- Tobacco Licensing Program

Other

- Charitable Check-off
- Collection of Other Governments' Accounts
- Greenlight Oregon Labor Rebate Fund
- Industrial Site Readiness
- Kicker Refund Donation
- Long Term Enterprise
- Multistate Tax Commission
- Non-Profit Homes
- Oregon Production Investment Fund
- Political Contributions
- Senior and Disabled Citizen Property Tax Deferral Program
- Small Tract Forestland Program
- Strategic Investment Program (SIP)
- Strategic Investment Program Gainshare (SIP)

This list does not include the large number of major tax credit programs such as Agricultural Overtime, Child Tax Credit, etc.

THE PLANNING PROCESS

Strategic planning is critical to the effectiveness of any organization. It enables an agency to establish goals, prioritize initiatives, measure progress, and carefully allocate limited time, resources, and attention. Skillful planning also contributes to organizational cohesion and helps foster a shared purpose with common values.

The Oregon Department of Revenue's strategic plan is the result of a year-long effort. The goal was to update the department's last adopted strategic plan and create a repeatable, inclusive, forward-looking strategic planning process for the department.

Phase one provided clarity into the existing perception of the agency and environmental factors impacting the agency's work. This guided the high-level elements of the plan such as a new vision, mission, and values.

The Oregon Department of Revenue communicated with hundreds of customers and partners. Participants included state agencies, local governments, tribal leaders, tax professionals, industry representatives, community-based organizations, and Department of Revenue staff.

The planning process included:
• 818 external partner completed surveys
• 527 staff completed surveys
• 14 workshops
• 3 all-staff meetings

Questions centered on areas such as:
• What are the challenges and opportunities facing the Oregon Department of Revenue?
• How can the Oregon Department of Revenue better serve our customers?
• What are the Oregon Department of Revenue's strengths and weaknesses?
• Where should the Oregon Department of Revenue be allocating resources?

These efforts ultimately provided themes that would directly inform the Oregon Department of Revenue's strategic plan.

Phase two of strategic planning transitioned into focus and action, where agency priorities, the strategies to impact those priorities, and the actions to carry out the strategies were developed. Finally, metrics were developed to evaluate and measure success over time.

Over the next six years, the primary and ongoing goal is to operationalize this strategic plan by implementing action plans; developing state funding and policy proposals to move key objectives forward; and monitoring metrics to track progress. The Oregon Department of Revenue will continue to manage and monitor this strategic plan for the duration of the plan's six-year time horizon.

Phase 1: Clarity

Insights

What environmental factors do we need to consider, and what customer and partner perceptions about Oregon and the agency exist?

Vision

What is the ideal future state we are trying to create?

Mission

What is our purpose? What are we here to make happen?

Values

What are our internal fundamental beliefs that shape how we work together and serve our mission?

Phase 2: Focus & Action

Priorities

What must be accomplished over the planning horizon?

Goals

What collective action do we need to take to deliver on our priorities?

Metrics

How will we measure success?

Phase 3: Implement, Evaluate, & Measure

Action Plan

What actions need to be taken by teams to achieve plan priorities?

Track Progress

How are we doing? Do we need to adjust or take different actions?

Report

Share results and progress toward plan goals.

WHAT WE LEARNED

The department needs diversity, equity, and inclusion infrastructure critical to serving historically and currently underserved and under-resourced communities.

Many of the department's customers face barriers that interfere with their ability to voluntarily comply with the tax system, and appeal or pay amounts owed. Lack of trust in the system, fear of taxes, complex tax situations, language barriers, inability to access tax help sites, and individual hardships can prevent people from filing their taxes and from receiving other benefits they may be eligible for based on tax filing status. As described in the State of Oregon's 2021 Diversity, Equity, and Inclusion (DEI) Action Plan: A Roadmap to Racial Equity and Belonging, historically and currently underserved and under-resourced communities in Oregon include Oregonians who identify as:

- Native American, members of Oregon's nine federally recognized tribes, American Indian, Alaska Natives
- Black, African, African American
- Latina, Latino, Latinx, Hispanic
- Asian
- Pacific Islander (including Compact of Free Association Citizens)
- Immigrants, Refugees, Asylum-Seekers, Deferred Status Holders, Temporary Protected Status
- Undocumented, Deferred Action

for Childhood Arrivals (DACA) recipients, "Dreamers," Non-Immigrant Visa Holders
- Linguistically diverse, English language learners (ELL)
- Economically Disadvantaged
- People with disabilities
- LGBTQIA2S+
- Farmworkers, Migrant Seasonal Workers

We recognize that individuals often identify with multiple communities and are impacted by compounding systems of oppression, also known as intersectionality.

Customers and staff suggested that the department create a Taxpayer Advocate, offer services in more languages, and improve outreach to historically and currently underserved and under-resourced communities in Oregon. The passage of House Bill 3373 (2021) established the office of the Taxpayer Advocate housed within the Oregon Department of Revenue.

The department's purpose and role are muddled in customers' minds.

Customers often lack a comprehensive understanding of what the Oregon Department of Revenue does and does not do. There is an opportunity for improved communication and promotion of the agency's programs and services. Customers do not clearly delineate between areas where the department has policy discretion and where it does not have policy discretion. Customers are often confused about the difference between the Internal Revenue Service (IRS) at the national level and the Oregon Department of Revenue at the state level and do not distinguish between state and federal tax agencies.

The department has respected and service-oriented staff.

Professionalism is an area in which the department excels according to our customers. Overall, customers say our staff is helpful, courteous, friendly, and easy to work with.

Customers have difficultly accessing the department in all the ways they want to and the department's systems and tools are not always clear or easy for them to use.

In general, customers would prefer to reach a person to talk to on the phone if they want to. Some customers struggle with long wait times, being transferred, having to call back, or being directed to automated or online options first and feel there is a lack of accessibility to a "human" when they feel they need it.

Conversely, customers also want to satisfy their needs and answer their questions without having to call and speak to the department in person. How customers access the department without making a phone call is through our Revenue Online services, website and email. Customers express frustration with their experience of our online services as well as the amount of information available to them. Our online systems can be confusing, difficult to navigate, unclear, and easy for customers to make mistakes. Customers also experience difficulty finding what they need on the department's website and in correspondence. Letters that go out to taxpayers are not always timely and are sometimes incorrect, inconsistent, or contradictory. This makes them confusing to understand and respond to correctly.

Staff share these concerns and feel the impact of customers' frustrations about accessibility. Staff and customer suggestions for improving accessibility include adding staff to call centers, adding a chat feature, staff availability on weekends, publishing email addresses and phone numbers for contacts for each tax program, and improving response times to mail and email. Additionally, businesses would prefer one-stop shopping with the department and would like to have one person that they can contact about all of their taxes rather than having to talk to multiple people about the various tax programs into which they pay. Suggestions for website and online service improvements include a better search tool for forms, more in-depth information about tax programs so customers can satisfy their needs and answer their own questions without having to call, better website navigation overall, and improving correspondence.

Staff desire expertise across department programs and services, more opportunities for professional growth, and access to more training.

Expertise is about ensuring staff are properly trained and have developed knowledge of the department's programs and services. When a customer has a question staff should be prepared with an appropriate and accurate answer. Customers experience inconsistency in the level of staff expertise as well as sometimes receiving different answers to the same question based on talking to different department employees. This is confusing for the customer and can make it difficult for staff to resolve issues for customers. Customers, as well as staff, suggested department employees would benefit from more training as well as cross-training.

OUR PRIORITIES

Racial Equity

We are committed to diversity, equity, and inclusion. The State of Oregon is committed to establishing strong leadership to eradicate racial and other forms of disparities in all aspects of state government. We look to center equity in budgeting, planning, procurement, and policymaking. We work to strengthen public involvement through community engagement, access to information, and decision-making opportunities. We work to improve equitable access to our services, programs, and resources. We work to foster an inclusive workplace culture.

Priority

Adapt our culture, modify our practices, and adjust our infrastructure to ensure dignity and inclusion for all.

Goals

Implement and monitor Racial Equity Plan.
Implement the strategies and actions in the 2023-2027 Racial Equity Plan and monitor the plan's progress. Strategies focus on DEI infrastructure, inclusive communications, community engagement, data as a lever for change, inclusive budget process, procurement equity, inclusive workplace, and transparency.

Analyze and train on Racial Equity Impact Statements.
Analyze the Racial Equity Impact Statement process for effectiveness. Provide training and guidance to employees on how to understand the impact of our decisions on underserved communities.

Our Customers

We have a robust group of customers at the Oregon Department of Revenue, including individual taxpayers, people who have delinquent debt with the state, businesses, industry groups, tax professionals, community-based organizations, state and local partners, and Oregonians. Our vision is to serve these customers in ways that are clear and easy for them.

Priority

Make it simpler for customers to work with us.

Goals

Upgrade to modern contact systems.
Improve service to customers by cross-training staff, building and using data analytics, proactively planning for high-call peaks, and modernizing technology and systems.

Improve access and reduce barriers for online filing and payments.
Provide a free direct file option for Personal Income Taxes (PIT) on our website that interacts seamlessly with IRS offerings. Provide an interactive calendar that calculates payment due dates by program.

Improve the quality of correspondence.
Improve clarity and create more consistent letters and notices that are easy for our customers to read and understand. Make letters and notices available in multiple languages to better serve our historically and currently underserved and under-resourced communities in Oregon.

Accept all payments for all programs regardless of a customer's access point.
Improve service to customers by accepting all payments for a customer during one call or visit.

Our Employees

Our greatest strength is our people. We are a knowledge and information technology based agency and our people are the engine behind everything we do. Their determination and dedication ensure that together, we can collect the revenue that Oregon counts on.

Supporting our employees is the best way to support our partners and customers. We want to make sure people can see themselves in multiple roles here so we can capture and retain the knowledge in which we've invested. We want our employees to see clear opportunities for professional growth and advancement at the Oregon Department of Revenue. Achieving our mission relies on ensuring our employees are supported, encouraged to grow professionally, and have the tools they need to do their work.

Priority

Train and prepare our workforce for the future.

Goals

Support employee growth.
Implement additional phases of our mentorship program for employees at all levels. Create opportunities for employees to learn about positions throughout the department.

Create opportunities for cross-functional communication.
Facilitate cross-functional communication opportunities between employees and program areas to breakdown silos, foster networking, and improve coordination.

Our Data

Our investment in data analytics and related digital and technology approaches is critical to being prepared for the future, innovating with data, and improving results for Oregonians. Significant financial and non-financial benefits occur from using data analytics for data-driven government to improve financial returns, improve operational processes, and increase faith in government through greater transparency and public awareness.

Priority

Enhance data access and use.

Goals

Improve data literacy.

Continue our Community of Practice, conduct annual survey, and develop and share recommended training opportunities with employees. Use discussions from our Community of Practice, results from the survey, and agency feedback to refine our data practices and skills.

Improve data governance.

Mature DOR's data governance structure and processes, appoint data stewards, develop a logging system for all external requests of aggregated data, ensure currently published data is made more accessible to the public, and develop a pilot platform for internal centralized data access.

Tracking Our Progress

Taken together the priorities and goals build upon one another. With these connections in mind, we focus on making measurable progress toward achieving our strategic priorities by tracking progress indicators and metrics for each of our ten goals.

Goal 1: Implement and Monitor Racial Equity Plan.

Measure success according to guidance from the Governor and Oregon Department of Administrative Services (DAS) for state agency racial equity plans.

Goal 2: Analyze and train on Racial Equity Impact Statements.

Measure success according to guidance from the Governor and DAS for state agency racial impact statements.

Goal 3: Upgrade to modern contact centers.

Measure success based on incoming call data, and customer service satisfaction ratings.

Goal 4: Improve access and reduce barriers for online filing and payments.

Measure success based on incoming call data, customer surveys, and GenTax analytics.

Goal 5: Improve the quality of correspondence.

Measure success based on customer surveys and customer service satisfaction ratings.

Goal 6: Accept all payments for all programs regardless of a customer's access point.

Measure success based on customer surveys and customer service satisfaction ratings.

Goal 7: Support employee growth.

Measure success based on employee engagement survey results and on the employee training performance metric.

Goal 8: Create opportunities for cross-functional communication.

Measure success based on surveys of employees' expereince after department events.

Goal 9: Improve data literacy.

Measure success based on surveys of employees' perception of their ability to read, work with, analyze, and communicate with data.
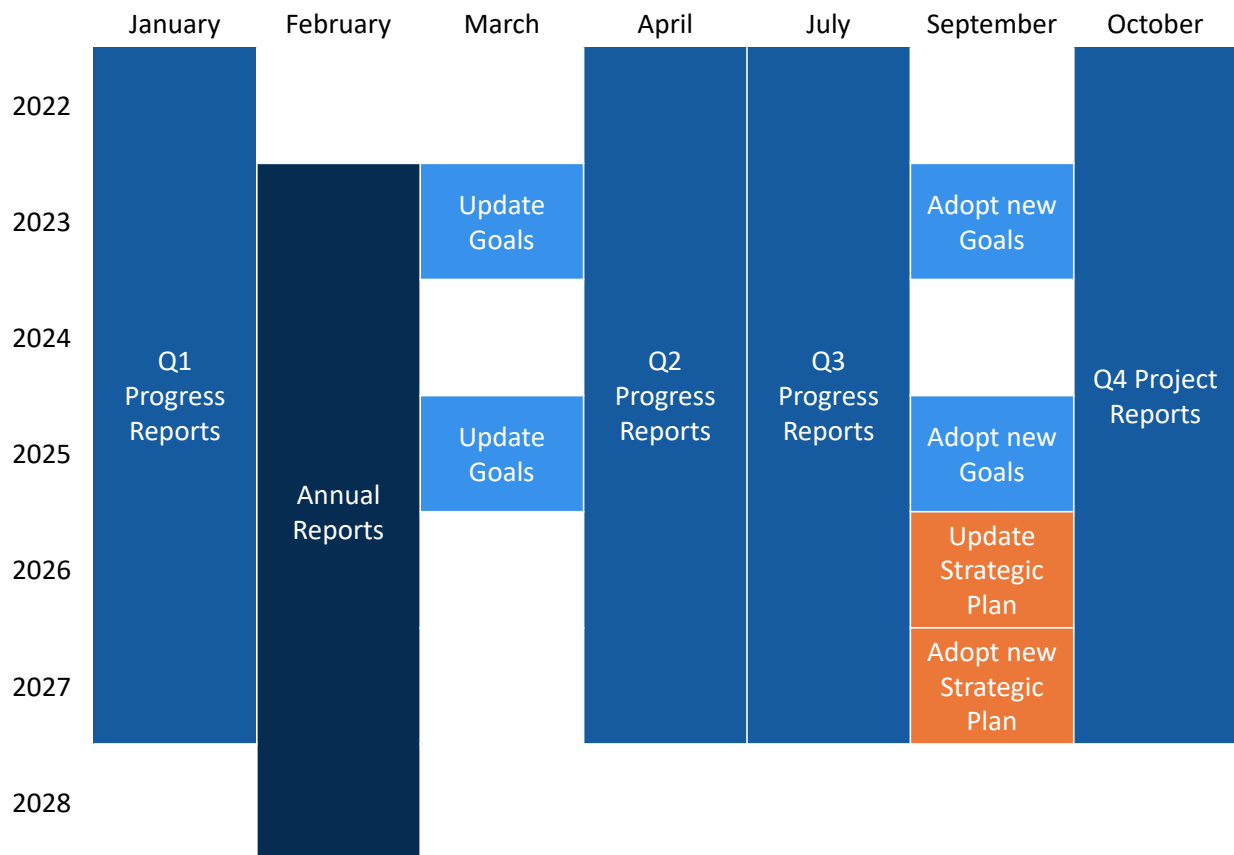
Goal 10: Develop data governance.

Measure success based on surveys of employees' perception of whether data is usable, accessible, and protected.

Monitoring and Evaluating

Our strategic planning lifecycle is a six-year lifecycle based on the 2022 - 2027 strategic planning horizon. The lifecycle outlines the responsibilities and frequencies of monitoring and evaluating the implementation of the plan throughout the life of the plan.

The strategic planning coordinator in collaboration with executive sponsors and program and project managers shall report quarterly progress to the Revenue Leadership Team and all staff. The strategic planning coordinator in collaboration with executive sponsors and program and project managers shall report annually to the director on progress and accomplishments. The Revenue Leadership Team shall review and update strategic planning goals every two years, and shall review and update the strategic plan every six years.

	January	February	March	April	July	September	October
2022							
2023			Update Goals			Adopt new Goals	
2024	Q1 Progress Reports			Q2 Progress Reports	Q3 Progress Reports		Q4 Project Reports
2025		Annual Reports	Update Goals			Adopt new Goals	
2026						Update Strategic Plan	
2027						Adopt new Strategic Plan	
2028							

Appendix

2022-2023 Strategic Goal Progress

Racial Equity

Goal 1: Create and implement a Racial Equity Plan: We will create an organization-wide and data-informed, 3- to 5-year, agency-specific racial equity plan that incorporates the State of Oregon's diversity, equity, and inclusion strategies into the Oregon Department of Revenue.

Completed Tasks
- ✅ Created and adopted the department's first Racial Equity Plan.

- ✅ Racial Equity Plan details have been shared with the agency through news and announcement articles.

- ✅ Plan is being monitored for progress on a monthly basis.

Goal 2: Create and Use Racial Equity Impact Statements: We will create and use Racial Equity Impact Statements to guide and inform our decision making. We will implement the recommendations of the Racial Justice Council to define roles and guidelines for using Racial Equity Impact Statements in our processes.

Completed Tasks
- ✅ Created and implemented Racial Equity Impact Statements for developing agency budgets and administrative rules.

Our Customers

Goal 3: Upgrade to modern call center and phone systems: Hire a consultant to evaluate options for offering 24-hour services to customers, develop strategies to optimize the use of live assistance, and include strategies for meeting the demands of a potential surge event. Consider features such as artificial intelligence, machine learning, instant messaging (chats), answer bots, pay by phone, and screen pops.

Completed Tasks
- ✅ Completed a consulting engagement that provided a report with recommendations on customer experience goals, metrics, design, organizational alignment, and implementation strategy.

- ✅ Provided consultant recommendations report to the legislature, as required.

- ✅ Established the Customer Experience Center of Excellence (CxCOE) and hired a CxCOE director and a call center strategist.

Goal 4: Improve online services: Make it easier for customers to sign in, navigate, and use our customer-facing system, Revenue Online, that connects to our newly modernized internal tax processing system, GenTax. We want to offer customers more 24/7 self-service options and allow customers to use any device (i.e., phone, tablet, laptop) to access the system.

Completed Tasks
- ✅ Launched version 12 of GenTax Revenue Online that includes enhanced customer experience.

Goal 5: Improve website features and functionality: Review and improve the Oregon Department of Revenue's external website navigation, level of program information provided, program contact information, and forms searchability. Upgrade to the newest available website platform.

Completed Tasks

- ✔ Completed external website migration to create a more modern, lean, and user-friendly customer experience with our website.

- ✔ Upgraded to newest platform.

- ✔ Implemented consultant provided website recommendations part of the External Website Migration.

Goal 6: Improve the quality of correspondence: Improve clarity and create more consistent letters and notices that are easy for our customers to read and understand. Make letters and notices available in multiple languages to better serve our historically and currently underserved and under-resourced communities in Oregon.

Completed Tasks

- ✔ Identified, sequenced, and grouped various correspondence and letters used by each program so that they can be updated to improve clarity and create more consistent letters and notices for taxpayers.

- ✔ Completed review of first batch of letters and executed external engagements to receive feedback on them.

Goal 7: Accept all payments for all programs regardless of a customer's access point: Reduce customer call transfers or physical transfers between programs by cross-training and allowing staff from any program to take any payment for any program in the department.

Completed Tasks

- ✔ Received necessary DAS CHRO approval for the Collection Division's permanent finance plan and submitted a request for DAS CFO final approval. This permanent finance plan includes reclassifying various vacant Revenue Agent 3 positions into Revenue Agent 2s to create a new unit in the Collection Division that will handle both tax and non-tax debt.

- ✔ Submitted and prioritized system improvement to begin in 2024. Gathered requirements for Single Payment Plan.

Our Employees

Goal 8: Enhance employee training: Build a comprehensive employee training program that enhances recruitment and retention, and positions employees to achieve success, including opportunities for promotion.

Completed Tasks
- ✔ Created a training list per position/classification on HR Intranet.

- ✔ Procured LinkedIn training and diversity, equity, and inclusion training and posted them on intranet.

- ✔ Each division created onboarding plans and checklists for new employees.

Goal 9: Ensure new managers have the tools they need to succeed: Build a comprehensive new manager training and support program that provides timely training, resources, and tools needed to complete manager tasks, and teaches leadership skills and management best practices.

Completed Tasks
- ✅ Created and launched first phase of mentorship program.
- ✅ Completed a toolkit for new and front-line managers.

Goal 10: Facilitate knowledge transfer and cross-training: Create career development pathways for current employees, and knowledge retention and transfer processes for new employees.

Completed Tasks
- ✅ Created list of critical positions.
- ✅ Updated procedures and workflows for areas of unique knowledge or experience in the agency.
- ✅ Created cross-training and succession plan for highly technical positions.
- ✅ Created a Succession Plan and submitted to DAS.

Our Data

Goal 11: Improve data literacy: Data literacy is the ability to read, work with, analyze, and communicate with data. It includes the understanding of data sources and constructs, analytical methods and techniques applied, as well as the ability to describe the use case, application, and resulting value. Data literacy empowers employees at all levels to ask the right questions of data and machines, build knowledge, make decisions, and communicate meaning to others.

Completed Tasks
- ✅ Developed and sent out a survey instrument to gauge progress in literacy and governance goals to managers.
- ✅ Identified and posted data analytics training to DOR research intranet.

Goal 12: Develop data governance: Data governance helps ensure that data is usable, accessible, and protected, as well as ensuring that the department complies with all levels of regulatory requirements. The principles of data governance include accountability, standardized rules and regulations, data stewardship, data quality standards, and transparency

Completed Tasks
- ✅ Developed and submitted an open data plan and data inventory to DAS.
- ✅ Incorporated data governance into RLT charter.

Goal 13: Create and execute a data strategy: Develop a plan designed to improve all of the ways we acquire, store, manage, share, and use data to support data management across the department.

Completed Tasks
- ✅ Hired a contractor to provide a gap analysis and develop a data strategy to improve access and use of data.

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