



JULY 2023 - JUNE 2024

ANNUAL REPORT



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Pictured: La Push First Beach, 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 22 states.

The agency's staff of nearly 1,500 includes a wide variety of positions such as lawyers, agents, public benefit specialists, 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. The agency collected a total of \$39.8 billion in state and local taxes in Fiscal Year 2024. To get to that number, the agency processed 3.1 million tax returns from more than 632,000 businesses filing monthly, quarterly, or annually. It also processed more than 424,773 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.
- Administering 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.



John Ryser, Deputy Director

John directs the Customer Experience and Communications and Working Families Tax Credit divisions, as well as Revenue's Lean, Information Governance Office, 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, Acting Senior Assistant Director of Tax Policy, and Acting Director.



Heidi Geathers, Senior Assistant Director of Administrative Services

Heidi oversees the Information Services, Business and Financial Services, and Human Resources divisions, as well as Revenue's Equity & Community Partnerships program. 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.



Tim Jennrich, Senior Assistant Director of Tax Policy

Tim oversees the Department's Administrative Review and Hearings, Interpretations and Technical Advice, Legislation & Policy, Property Tax, and Research and Fiscal Analysis divisions, as well as the Department's Tribal Partnership Program and Legislative and External Affairs programs. He is responsible for the overall development of agency tax policy. Tim has worked for the Department for 17 years, bringing his legal and policy expertise to a variety of tax policy positions, including tax policy specialist and Assistant Director for both the Legislation & Policy and Interpretations and Technical Advice divisions. He also has played an important role in representing Washington as a delegate to the national Streamlined Sales Tax Governing Board and with the Multistate Tax Commission. Tim received his law degree from Seattle University, a master's in taxation from the University of Washington, and is an active member of the Washington State Bar Association.

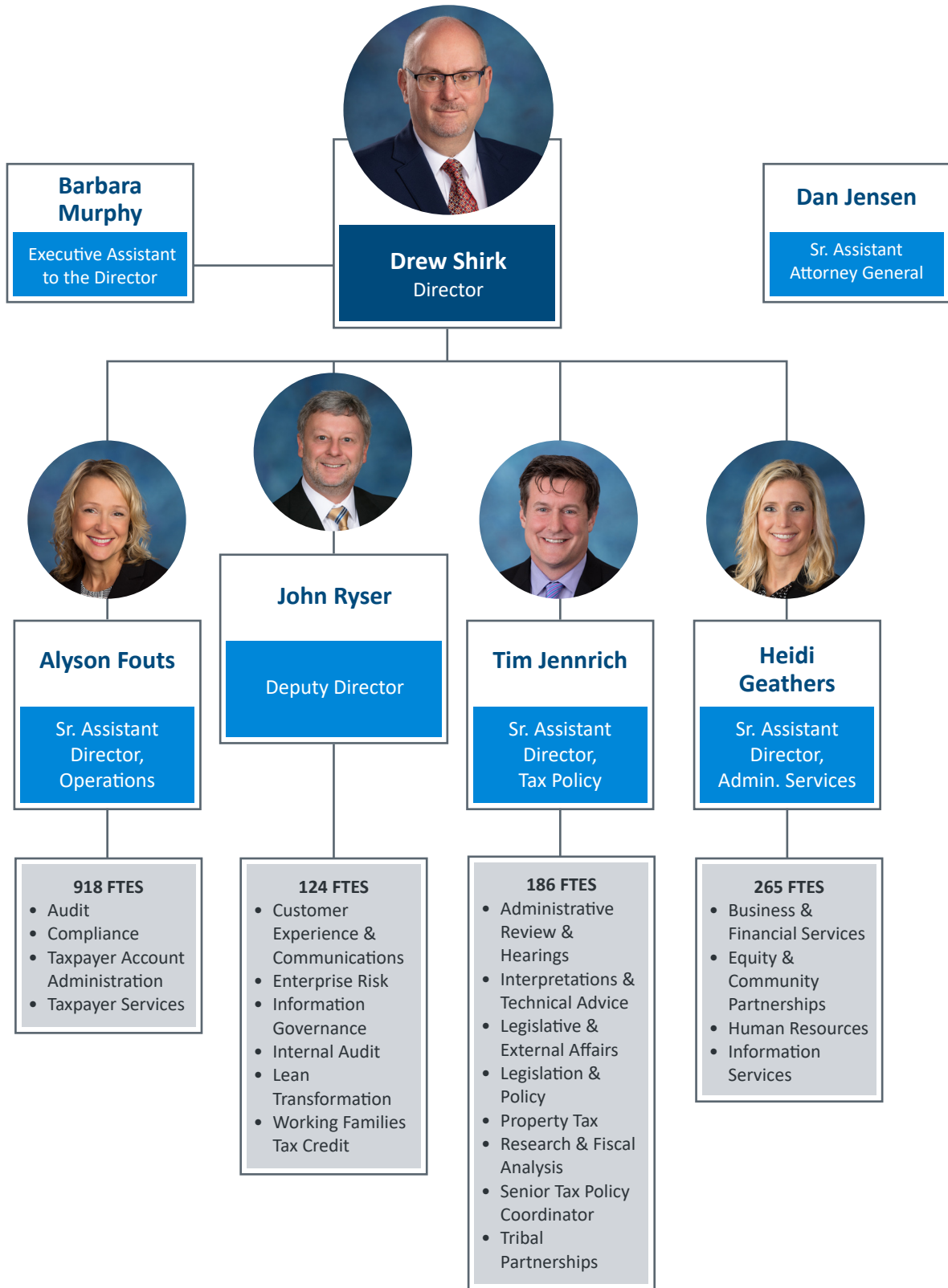


Alyson Fouts, Senior Assistant Director of Operations

Alyson manages the Audit, Compliance, 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 operations roles including Program Manager for Interpretations and Technical Advice and Assistant Director of Taxpayer Services.



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 tax 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 and training 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 laws and public programs the department administers.

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 Unclaimed Property program.

Taxpayer Services

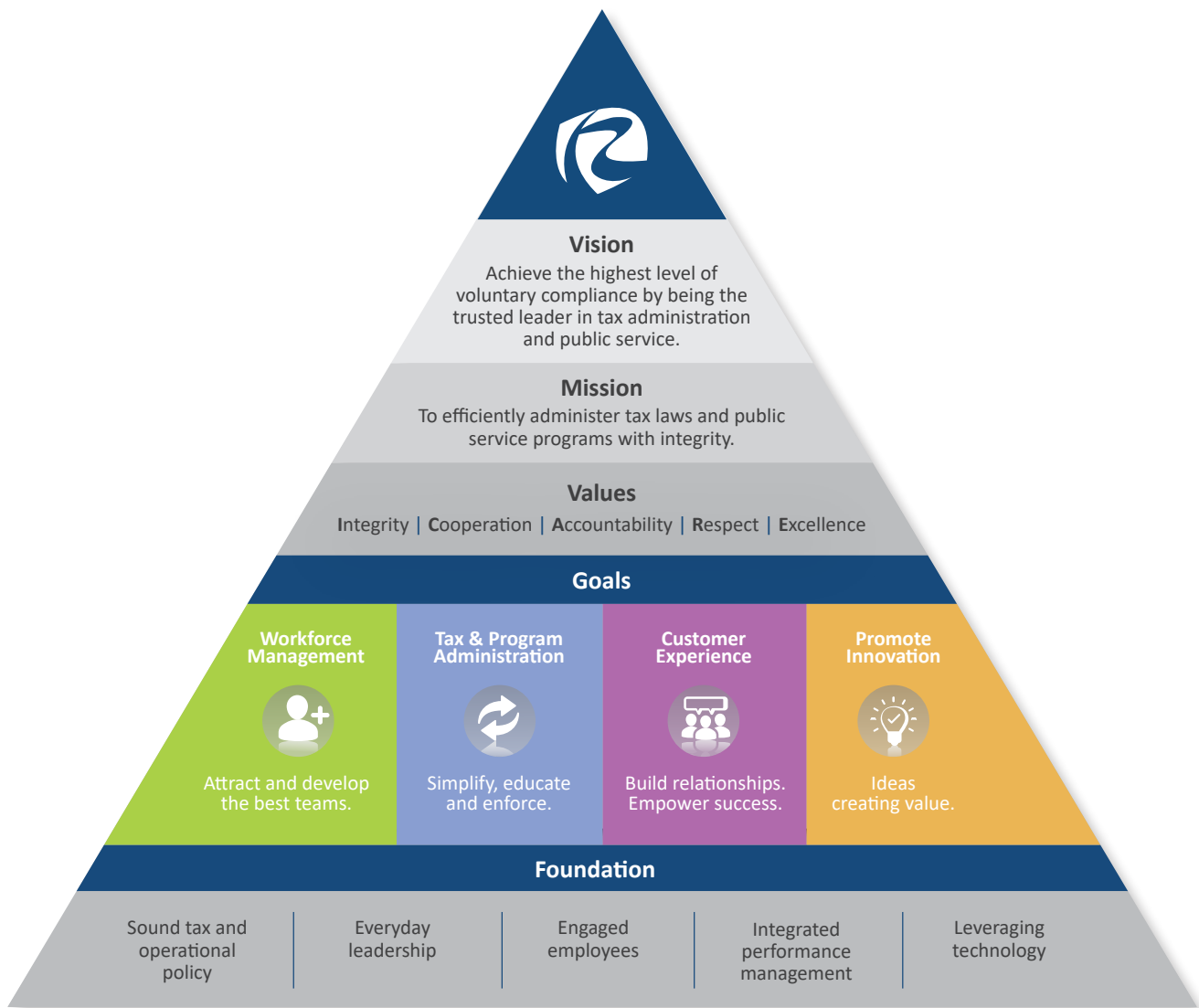
Core duties: Managing statewide Business Licensing Services, in-bound call center, taxpayer service program, and taxpayer rights advocate.

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 (FY24)

State revenues (in billions):

Retail sales and use tax	\$15.9
Business and occupation	\$6.9
State property tax levy	\$4.6
Other state taxes	\$4.5

Local revenues:

Retail sales and use tax	\$7.1
Other local revenues	\$0.8

Total collections **\$39.8**

Cost per \$100 collected 56¢

Reporting/active businesses

Active reporting (as of 7/1/2024):

Monthly	176,102
Quarterly	240,007
Annual	216,529
Total	632,638
Audits	4,331
Voluntary compliance	98.2%

Tax return filings

Monthly	2,090,158
Quarterly	882,297
Annual	192,980
Total	3,165,435

Staffing

FTEs	1,501.6
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Operating budget 2023-2025 biennial

FY24	\$224.1M
FY25	\$208.6M
Total	\$432.7M

Unclaimed Property

Property reported	\$365M
Claims approved	419,718
Returned to owners	\$154M

Working Families Tax Credit (WFTC)

Applications approved	194,799
Children benefited	285,000
Total refunded	\$145.1M

Tax revenue collected and what it provides

- \$15.9 billion — State retail sales and use tax
- \$6.9 billion — Business and occupation tax
- \$4.6 billion — State share property tax
- \$4.5 billion — Other state taxes and fees
- \$7.1 billion — Local retail sales and use tax
- \$0.8 billion — Other local taxes



Customer service



11.4 million

Website visits



344,773

Phone calls



804

WFTC outreach events



21,162

Live chats



424,773

Business license applications and renewals received



97

Educational workshops (2,254 attendees)

Revenue's focus on the future

With new leadership, legislation, and a changing technological and workplace landscape, Revenue has its focus on continuing the groundwork for a bright future.

From accessibility and inclusivity to modern systems management and artificial intelligence, the agency is leading the way to even more taxpayer compliance and satisfaction, improved employee retention and morale, and efficient processes for both the workforce and the public.



Revenue ups the ante when it comes to DEI

At Revenue, one goal is to reflect the diversity of Washington state and the people who live here. In this spirit, the agency expanded Diversity, Equity, and Inclusion (DEI) efforts into an Equity and Community Partnerships Program. Housed within the Executive division, the program highlights that DEI is integrated into sound tax policy and public service.

The foundation of the program includes:

- Internal focus and accountability, to include training, recruitment, and retention.
- Cultural competency and belonging, to include people-first efforts like the Inclusion, Diversity, and Equity Committee (IDEC), Employee Resource Groups, and DEI champions.
- Customer and community engagement, to include the Pro-Equity Anti-Racism (PEAR) team, Business Advisory Council, Tribal Partnerships Program, accessibility outreach efforts.

The Equity and Community Partnerships Program is

supported by Senior Assistant Director of Operations, Heidi Geathers. In FY24, the program welcomed:

Equity & Community Partnerships Manager,

Dontae Payne. Dontae currently serves as Senior Policy Advisor for Civil Rights and Racial Justice in the Office of the Governor.



Additionally, he's served on the governor's external affairs team and constituent services and as Deputy District Director in the U.S. House of Representatives. Dontae was recently elected to the role of mayor for the City of Olympia and is the first Black American and openly gay person elected or appointed to the office of mayor in Olympia's 164-year history at the time of the election.

Employee Engagement & Belonging Manager,

Joanna Falcatan. Joanna continues her role with Revenue, leading IDEC, partnering on the PEAR team and Language Access planning committee, and

providing Executive Sponsorship of our Hawaiian, Asian, Pacific Islander (HAPI) Employee Resource Group. Joanna is also active at the state-level, such as membership with the Washington DEI Council. She has worked in Washington state government for 25 years and has been a part of the Revenue family for more than 10 years. Joanna is excited to continue her DEI journey in her expanded role with the Executive division.

Photo coming soon.

A third management position will round out the team. This person will focus on customer equity.

FY24 highlights include:

- Drafted the agency’s first DEI Strategic Action Plan.
- DEI Team attended the Certified Diversity Executive Certification program.
- Supported launch of PRISM (LGBTQIA+) Employee Resource Group.
- Consulted state Office of Equity on race and ethnicity data collection for Revenue’s demographic data report as requested by the Legislature via 2024 budget proviso.



Hybrid work means intentional workplaces

The pandemic accelerated remote work in an unanticipated way and the agency adapted well with extra flexibility for employees and uninterrupted lines of service for our customers. While much of the work can be performed remotely, there are also in-person gaps that need to be filled to continue having an engaged, connected, and informed work environment.

In addition, the agency is navigating the Washington State Office of Financial Management guidelines around facilities and space use including reducing office footprints by a minimum of 20% based on in-office usage. These changes bring exciting opportunities to re-imagine what a hybrid work environment has to offer.

As a first step, each division formulated a plan for the hybrid work environment that’s best for their teams. Intentional hybrid experiences enhance Revenue’s culture of collaboration and respect, continues to build community among employees, ensures effective tax administration, and encourages successful work relationships. All employees benefit from the hybrid work experience and no employee is fully remote. Leadership teams continue to build their intentional hybrid work experiences.

Revenue continues to assess how and where employees work to ensure that current work environments are the most effective and efficient means to meet the agency’s mission, fulfill its responsibilities, and continue to be an employer of choice.

Systems management for the win

Revenue has had great success in moving from fragile legacy systems to a modern, integrated tax administration system known as ATLAS. Most recently, ATLAS added the Working Families Tax Credit and Capital Gains tax. As the agency has evolved, matured, and grown, ATLAS has met every challenge. A truly integrated tax administration system, ATLAS has touch points to nearly every division within the agency.

As the use of the ATLAS system expanded, leaders identified a problem statement of: It is unclear if DOR is using the most efficient support model for an integrated system for effective accountable government. Efforts to answer that problem statement began in June of 2023.

Going forward, the agency is using data to better understand how we prioritize and resource the work, as well as clarifying a shared understanding of the processes, roles, and expectations.

The next major ATLAS maintenance upgrade, scheduled for January 2025, which will provide even more efficiencies.

Artificial intelligence (AI)? Where the agency stands with AI innovation

Artificial Intelligence (AI) is here. Revenue understands the need to be proactive and knowledgeable about AI capabilities in tax administration. To be thoughtful with strategy, leaders recognize that AI is a powerful tool and are active in the discovery process keeping risks and benefits top-of-mind.

The agency is committed to understand and leverage this technology to help achieve business goals. Understanding that this is no different than prior tech revolutions, such as computers, internet, or even remote work, teams are keeping agile to adapt and change with the work.

FY24 highlights include:

- Reviewed the Governor’s Executive Order on AI and expectations.
- Launched an internal AI workgroup.
- Began participating in the Washington Technology Solutions (WaTech) AI Community of Practice workgroup.
- Volunteered for WaTech’s AI use-case inventory subcommittee.
- Explored Generative AI capabilities with vendors.
- Began drafting agency guidance on AI use, with special attention to training, privacy, security, and bias risks.

Strategic Business Plan (SBP) Initiative Successes

While the work continues, five SBP initiatives were considered complete in FY24, since identified as priorities in 2022:

Language Access: 90% of action items have been completed in Revenue’s first Language Access Plan, including establishing a program with standardized procedures and quality control. (See story page XX.)

Employee Resource Groups (ERGs): ERG created for Hawaiian, Asian & Pacific Islander employees and LGBTQIA+ employees and allies. Employee interest in forming more ERGs continues. (See story page XX.)

New Payment Options: Working Families Tax Credit recipients may now receive prepaid cards as a payment option. Future implementation of prepaid credit cards will be explored for Unclaimed Property.

Modernize services by conducting a call center feasibility study: The study is complete, and a decision package is ready for the Legislature. The agency is exploring potential vendors, as well as continuing to maintain and enhance the existing platform.

Replace the Legislative Tracking System (LTS): Solution chosen was a customized system using Power Platform. Sponsors are submitting a decision package to the Legislature to seek funding to procure a vendor for the system build, with work to identify “future state” business requirements.

Still in progress Agency outreach using data to increase voluntary compliance: Finalized education letters to pilot industry groups and continue to improve system features to send letters and track responses.

The agency is solidifying its next round of strategic business initiatives.

Working Families Tax Credit strong in second year

The Working Families Tax Credit (WFTC) division issued nearly 195,000 refunds totaling over \$145 million to individuals and families in Washington during Fiscal Year 2024.

Community organizations

This year, 27 community organizations received grants to build relationships and promote the tax credit. They covered 95% of the state with more than 460 outreach events. Through their outreach efforts, they informed 280,000 people about WFTC throughout the state with advertising, flyers, social media, and more.



Pictured: Outreach Specialist Francisco Diaz handing out program information during a Dia de Muertos event.

Revenue's WFTC Outreach Team

The Outreach Team had two goals this past fiscal year and met or exceeded both:

- Hold one community event in at least 80% of counties – exceeded goal by covering 97% of counties.
- Hold one application event in every county – met goal.

Through these events, the team interacted face-to-face with an estimated 15,000 people.



Pictured: Outreach Specialist Quynh-Anh Nguyen assisting with applications in the Lynnwood library.

Advertising campaign

For the second year in a row, Revenue partnered with an advertising agency to help build awareness and drive traffic to the WFTC website. The FY24 campaign used advertising strategies to expand awareness of the program, such as:

- Billboards across the state.
- Broadcast TV and streaming video.
- “Out-of-home” advertising (such as transit stops).
- Broadcast radio and digital streaming audio
- Social media (Instagram, Facebook, Youtube).
- Mariners TV and radio sponsorships.

With these efforts combined, the program received approximately 184,000 applications from Washington residents for the 2023 tax year. Since families are still able to apply for the credit retroactively, 29,000 additional applications were also received for the prior tax year (2022).

The Unclaimed Property Program continues to break records

Revenue administers Washington’s Unclaimed Property (UCP) program as a free public service that reunites property and assets with rightful owners or their heirs.

To date, the program has returned over \$1.5 billion to rightful owners. In FY24, the program received a record \$365 million in unclaimed property and returned an all-time high of \$154 million to the rightful owners. Currently, there is almost \$2.2 billion of unclaimed property available to be claimed.

What is unclaimed property?

In Washington state, businesses and organizations must check their records every year to see if they have any unclaimed money, stocks, or property. If something has been unclaimed for a certain amount of time (usually three years, but it can vary depending on the type of property), they must report it and transfer the unclaimed property to the state. Revenue acts as a custodian of the reported property until the owner or their heir(s) claims the property.

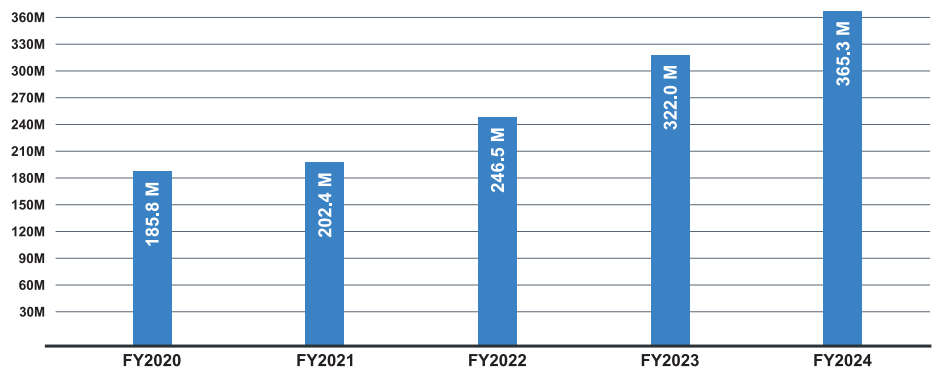
Record amounts returned and received

In FY24, the department reunited a record \$154 million in unclaimed property with the rightful owners, 42.2% of the total value of property received for the year. The amount paid was a 10.9% increase over the previous fiscal year.

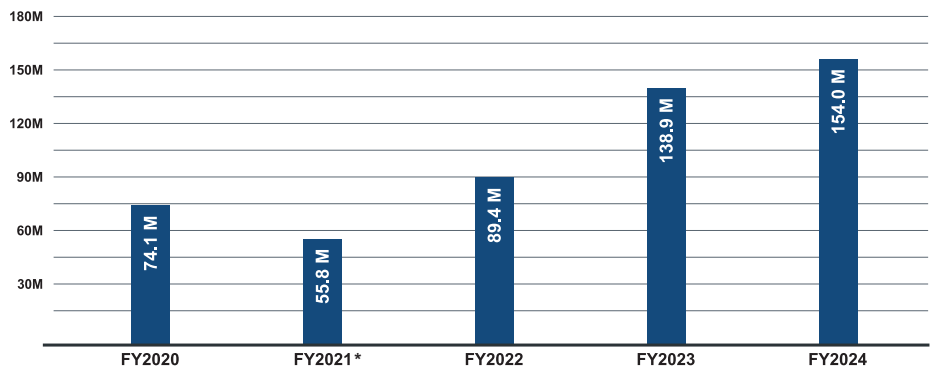
In addition, the department received \$365 million in unclaimed property, up \$43 million from \$322 million the prior year.

“The volume of unclaimed property has grown exponentially over the last few years. Revenue has worked tirelessly to identify, safeguard, and return these funds to their rightful owners,” shared Debra Conn, Assistant Director of the Taxpayer Account Administration division which oversees Revenue’s UCP program. “The significant increase in both reported unclaimed property and property reunited with the rightful owner is a testament to the program’s dedication and hard work.”

Amount Received



Amount Returned



**UCP system upgrade impacted money returned.*

Money Match Program continues to thrive

The department continued automatically returning certain unclaimed property to Washingtonians after verifying ownership under the Money Match Program, using data to verify owners against reports filed by Holders, and then sending a letter to validate the address. Once the department verifies the owner and their address, a check is issued to owners without requiring them to file a claim or submit documentation. This effectively removes barriers, making it easier for people to be reunited with their property. In FY24, the program issued 42,198 checks totaling \$6 million.

UCP focuses on Spanish language accessibility

The department has continued to focus on making searching and claiming unclaimed property more accessible for Washington’s Spanish speaking

community. In addition to having the state UCP website available in Spanish, Revenue added “How To” videos in Spanish for searching and claiming unclaimed property, and for businesses submitting and paying their unclaimed property reports.

“By making our unclaimed property website accessible in Spanish, we are reducing language barriers and ensuring that a wider segment of our community can easily access our site and be reunited with their funds,” shared Conn.

The department used the following types of advertisements in Spanish to educate the community on the UCP program:

- Broadcast TV ads.
- Social Media campaigns on both Facebook and Instagram.
- Digital streaming audio.

Capital Gains Tax collections continue with process improvements

The capital gains excise tax is 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.

Revenues collected from this tax help fund the education legacy trust account and common school construction account.

Capital gains excise tax initial collections topped \$433 million in the second year.

Due dates for the capital gains excise tax (April 15 and October 16 for 2024) do not align with Washington’s fiscal year calendar, which closes June 30.

For budgetary purposes, refunds and payments due after the close of the previous fiscal year are included in the following fiscal year’s collections. For example,

additional refunds and payments from year one resulted in a decrease of \$62 million from this fiscal year’s collected total.

Total collections for the two-year biennium have exceeded \$1.2 billion.



\$433 million collected.



3,850 returns filed.



FY 2024 capital gains net collections is \$356,332,000.



\$371 million deposited into Education Legacy account.*

Modernized e-file option added

This year, Revenue implemented the Modernized e-file (MeF) program which allows taxpayers to file their capital gains tax returns using select federal tax filing software. Customers may also make payments and extension requests using MeF.

This new filing option allows customers to file the Washington capital gains return and their federal tax return, simultaneously. Over 3,400 returns have been filed using this option.

**This number reflects collections as of October 2024.*

Property Tax Exemption Outreach campaign launches

In 2023, the Legislature passed SHB 1355 making changes to expand the property tax exemption program for seniors, people retired due to disability, and veterans with disabilities (often referred to as “senior property tax exemption”). In addition to expanding the program, the bill also required Revenue to engage in statewide outreach to notify the public of the increased income threshold changes and application process.

New landing page

Since applicants need to file with their local county assessor, Revenue created a new, accessible webpage to learn more about the exemption and how to find their local assessor’s office to apply.

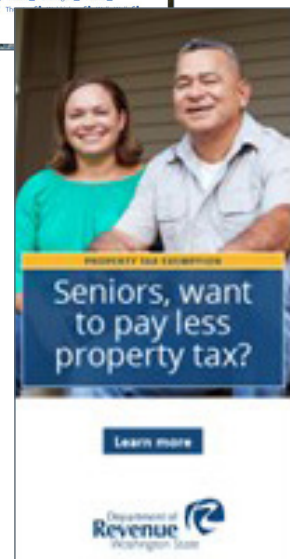
Outreach campaign effort

To build statewide awareness and drive website traffic to the new landing page, Revenue hired an advertising agency to create an integrated media strategy that included a mix of advertising through traditional, digital, and social media. Ads were featured in local newspapers, search results, social media, smart TV and streaming devices, and websites featuring information about finance, retirement, and taxes, and more.

The campaign audience was adults 55+, reaching not only eligible applicants, but also adult children helping aging parents with finances or home care.



Pictured: Revenue’s landing page (above). Advertisement targeted at seniors (right).



Revenue uses feedback to refresh Business Advisory Council format

Revenue’s Business Advisory Council (BAC) was formed in 2018 to facilitate dialogue between agency staff and members of the business community around operational and tax policy issues. In late 2023, Revenue’s Customer Experience and Communications (CEC) team resumed the coordination and facilitation of this group on behalf of Director Shirk.

Informed decisions

The team held facilitated discussions with each member of the BAC to learn what was working well and what could be changed. This feedback informed the work of the BAC for 2024. This means making the meetings more interactive and collaborative with



more topics that interest the members, their stakeholders, and the agency.

A recent example is discussion around penalties. Two members of Revenue’s Penalty Workgroup attended the BAC meeting to share options their workgroup had been considering. The BAC members discussed the various options and gave their feedback. Additionally, CEC followed up with a survey to rank and prioritize the options. The feedback is being used to actively inform agency business decisions. Gathering ‘Voice of the Customer’ feedback is an agency priority.

Moving forward

Post pandemic the group has agreed that two meetings each year will be in person (with a virtual option) and two meetings will be virtual. Of the 15 BAC members, 10 of those have served since the group was formed. That length of service raised the issue of reinstating term limits as was originally intended (but was pushed aside due to the pandemic). The group asked for volunteers to end their tenure and will be looking to add a few new members in 2025.

Building sound tax policies through Tribal Partnerships

Fostering collaborative and respectful partnerships with the 29 federally recognized Tribal Nations in Washington continues to be a key focus for the Department of Revenue. To support this mission, Tribal Partnerships works closely with Tribal governments, citizens, and businesses, as well as other entities that do business with them.

The Tribal Tax Advisory Group (TTAG), an advisory group comprised of Tribal representatives, Tribal

Partnerships Program representatives, and representatives from Revenue’s Executive Team, also continues to play a crucial role in building tax policies that respect both Tribal sovereignty and state regulations.

The department recently welcomed back Daniel Knudsen as the Tribal Relations Manager in February 2024, he previously held the Tribal Liaison role from 2021 to 2022.

Collaborating for change

The team is working on a proposal for enhanced revenue sharing with the Tribes. Under current state law, Revenue manages the collection of retail sales tax for tribes that have established compacts, with revenue sharing currently set at 50% and 60%. At the request of the Tribes, the department is working on new legislation to increase the Tribal share to 100%. If enacted, this change would immediately benefit seven of the eleven Tribes with existing compacts.

“The Tribes asked for it, and we are more than happy to work towards proposing a solution that they requested,” said Knudsen.



He added, “We’re committed to the ongoing relationships we share with Tribes and Tribal members and citizens and businesses throughout the state, and we’re glad we have the opportunity to work together.”

Writing in Plain Language remains a top priority

Using plain language when writing is fundamental to helping taxpayers understand their reporting responsibilities and the resources available to them. If people understand what they need to do, they will have a better chance of reporting correctly and use the public benefit programs the agency administers.

Revenue has a Plain Language team that edits and reviews the agency’s top public-facing documents. The team also provides bi-monthly trainings for agency staff on plain language best practices and tools for effective presentations/communication.

Over the past five years, the Plain Language team has averaged 196 plain language review requests per year (2019-2023). In fiscal year 2024, the team surpassed the average by completing 260 reviews.

What is plain language?

The goal of plain language is to make sure the content is clear and easily understandable for all audiences. Plain language is made up of writing and design

principles that create more accessible, and user-friendly products (documents, website content, forms, etc.). Readers should understand what they are being asked to do after the first time they read the material.

Plain language principles include:

- State your purpose at the beginning, most important information at the top.
- Write for your audience.
- Use short, simple sentences.
- Use everyday words your readers know.
- Use personal pronouns and active voice so the reader knows who is doing what.
- Design clear documents by using white space and headers.
- Avoid jargon and legalisms.

Why use plain language?

Revenue made a commitment to plain language in 2005 when Governor Gregoire signed Executive Order 05-03, requiring all state agencies to use simple and clear language when communicating with the public.

In November 2023, Governor Inslee updated the state's plain language standards with Executive Order 23-02, focusing on writing principles, design principles, and accessibility.



With Executive Order 23-02 in place, Revenue's Plain Language team will:

- Continue to review/edit public facing content.
- Work with each division to identify their top 10 most used public facing documents.
- Use the master list to ensure that all documents have gone through a plain language review.
- Review the master list biannually to make sure the documents listed are still the most vital.
- Conduct reviews on those vital documents biannually.

Supporting the Legislature

Revenue is statutorily required to provide 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.



590 bills analyzed.



485 amendments analyzed.



349 fiscal notes completed.



147 fiscal estimates completed.

The 2024 Legislative Session

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

SB 5897

Modified provisions of the Business Licensing Service program.

HB 1895

Modified the Working Families Tax Credit by clarifying the refundable nature of the credit, the application requirements, and the eligibility process.

SB 6215

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

SB 6080

Simplified the funding provisions of the statewide tourism marketing account.

Language access program finds its stride

Over the last two years, representatives from across the agency have been working to complete the language access strategic business initiative. This initiative was formed to create and implement DOR's first Language Access Plan, a roadmap for improving Revenue's language services. During FY24, this initiative was considered complete after being identified as a priority in 2022.

Language Access Plan accomplishments

Since starting the initiative, the team has completed more than 90% of action items in DOR's first Language Access Plan, such as:

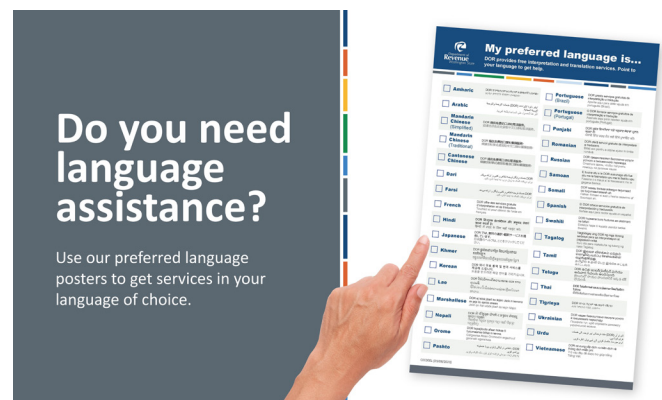
- Provided more ways for customers to get help in their language, either by using a point-to-your-language poster in offices, submitting an online translation request form, or finding help in their language on the agency's website.
- Translating over 30 vital documents and forms into top languages: Spanish, Russian, Korean, Chinese, and Vietnamese.
- A heightened level of awareness of language services among DOR staff through increased internal communications.
- A language access program with standardized procedures and improved quality control, which includes assessments for bilingual staff, using vendors with rigorous quality control processes, and more.
- A language access policy that supports the agency's commitment to these services.
- Easily accessible tools and resources for staff.

Services provided

In FY 24, Revenue's language access workgroup identified and translated over 30 vital documents and forms and made them easily accessible on internal and external websites.

A document is considered vital if an individual may face serious consequences if their information is not provided in a timely or accurate manner. Some examples include applications, consent forms, letter/notices pertaining to eligibility of benefits, etc.

The team translated the vital documents and forms into the current top languages: Spanish, Russian, Korean, Chinese, and Vietnamese. In addition to promoting these updated services to customers and staff, the agency continues to identify opportunities for translation and outreach.



Highlights include:

- Translation (written) requests: 429 projects completed.
- Interpreter (verbal) requests: 9478 calls into partner vendor Lionbridge.
- Languages: The agency serves most languages (44 in the Department of Enterprise Services contract) and will interpret or translate outside of the contract as requested.

The language access strategic initiative made great strides in improving services for both customers and DOR staff. The work continues as the agency identifies even more opportunities to build relationships and empower success for all customers.

Working hard for Working Families: Kevin Dixon earns Governor’s Award

The Governor’s Leadership Award is an annual achievement presented to a handful of individuals for their exceptional accomplishments in Washington state government.

Assistant Director of Working Families Tax Credit (WFTC), Kevin Dixon, was selected for his leadership in the swift and successful implementation of the Working Families Tax Credit (WFTC) program.

“I am truly humbled by this recognition. I have the most incredible team, and everyone’s support from around the agency made the program a success,” Kevin said.

Kevin was celebrated for his ability to navigate complex tax credit regulations, software, and stakeholder interactions, while exceeding participation goals; all to support the financial

stability, racial equity, and well-being of low-to-moderate income Washington residents.

Kevin has worked with Revenue for more than 20 years and is continuing to build a dynamic and inclusive approach to administering a public benefits program.

“It is rewarding to be a part of something so great that is making a difference in the lives of tens of thousands of our fellow Washingtonians,” said Kevin. “I am inspired and driven everyday by my team’s unwavering passion and commitment to the program and the communities we serve.”



Debra Conn earns national award for leading Capital Gains and Unclaimed Property

Each year, the Federation of Tax Administrators (FTA), a non-profit which serves the nation’s tax administrators, selects an outstanding leader for the distinguished Harley T. Duncan Award. This year, Revenue’s Assistant Director of Taxpayer Account Administration (TAA), Debra Conn, took home the title.

“I am humbled and honored by the recognition,” Debra said. “It was totally unexpected knowing I was up against some outstanding candidates.”

Debra’s nomination highlighted her work on Capital Gains Tax and improving Unclaimed Property’s customer service and visibility. It also showcased her leadership abilities through complicated change.



Pictured: FTA Board of Trustees President Nick Maduros, recipient Debra Conn, and FTA Executive Director Sharonne Bonardi

For 30 years, Debra has been immersed in tax systems. Starting in 1992 as an excise tax examiner, she worked her way up to assistant director of TAA, where she oversees more than 220 employees and an annual budget of \$26 million.

Continuing to mature our data-driven culture

Revenue completed its third annual maturity assessment in FY24. Since the agency's first assessment in 2022, there has been a:

- 24% increase in staff that use data to inform the decisions they make (74% to 92%).
- 13.5% increase in staff that use data at least once a week to make decisions (74% to 84%).
- 6% increase in staff that say they feel confident in their ability to use data in their current role (83 to 88%).

This year the program added a Data Driven Decision Making e-Learning introductory course to the employee Learning Center and an advanced course to Revenue's Leadership Capstone Program. A full catalog of the Performance Management Tracking System was also completed and a PowerBI template was shared with analysts.



Advancing our culture of continuous improvement

The Lean Transformation Office delivers four foundational Lean classes to further develop Revenue's culture of continuous improvement and ensure employees have necessary knowledge, skills, and abilities to participate. Training saturation from FY19 to FY21 increased but has plateaued in FY24.



Lean belt descriptive statistics

Revenue has a Lean Belt program to include training for Yellow Belts, Green Belts, and Blue Belts.

Employees who earn Lean belts join the agency's Lean Community of Practice, which meets quarterly to share tools and knowledge.

Yellow Belts lead their own process improvement efforts which are core to embedding Lean in our daily work efforts.

Green Belts facilitate workshops and trainings.

Blue Belts develop leader-standard work to enhance their role as a Lean Leader.

Active Yellow Belts: 71
Active Green Belts: 23
Active Blue Belts: 9

Continuous improvement efforts

The Lean Transformation Office and Green Belts support a wide variety of continuous improvement efforts for divisions including process mapping, problem solving, employee engagement efforts, and change management efforts. During FY24, Green Belts facilitated the following process improvement projects:

- UCP Holder Reconciliation – Target: 80% of unclaimed property reports reconciled within 30 days compared to the past rate of 65%.
- Executing Data Sharing Agreements with other Government Entities – Target: One month cycle to establish data sharing agreements compared to the past rate of three months.
- Disciplinary Action Review Process – Target: 70% of pre-disciplinary letters from managers/supervisors that contain errors or is missing information compared to the past rate of 90%.

- Tribal Distribution Review – Target: 184.5 hours to complete review compared to past average of 205 hours.
- Annual Review of Apportionable Income – Target: 0% filed unnecessarily compared to the past rate of 30%. Target date: December 2026.

- Contracts Invoicing – The Procurement & Contracts Unit is identifying consistency and time saving measures in their process.

Creativity sparks opportunities to give

Revenue continues to be a strong supporter of the Washington State Combined Fund Drive (CFD). This statewide 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.



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 campaign “fun-draising,” a dedicated group of agency campaign coordinators volunteer their time and efforts to educating staff about various charities and organizing in-person and virtual events. These fundraising events often include trivia contests, “cook-offs,” photo contests, bake sales, and more.

During Revenue’s 2023 CFD campaign:

- \$57,174 – Amount pledged to charities.
- 30.2% – Agency participation in CFD giving.
- 65 – Volunteer hours donated.

For the second year in a row, the Combined Fund Drive honored Revenue for having the highest participation rate of all large state agencies (500+ employees) during the campaign.

Introducing two new Employee Resource Groups

As part of the agency's strategic business plan to create employee resource groups (ERGs) modeled after the statewide business resource groups, the agency welcomed two new ERGs in FY24.

HAPI

Formed in December, this group serves as the agency's advisory and coordinating team to develop and support Hawaiian, Asian, and Pacific Islander (HAPI) employment & retention strategies across Revenue. HAPI's goals include:

- To foster a sense of inclusion and belonging in the Asian American, Native Hawaiian, and Pacific Islander (AANHPI) community that gives voice to their experience.
- To recruit and retain the AANHPI community at Revenue.
- To increase understanding and awareness of employee experiences in this group.
- To formulate recommendations based on the understanding of leadership, to improve the employee experience for this community.
- To contribute to the development of strategies that support the Governor's Executive Order 17-01, which reaffirms Washington state's commitment to tolerance, diversity, and inclusiveness.
- To recognize the contributions and accomplishments of our existing AANHPI community at Revenue.
- To create a support system to increase mentorship opportunities for AANHPI individuals.

HAPI is open to all who may be interested in attending, including allies and those in positions of leadership at Revenue.

"I have been delighted to watch the creation and development of this ERG and am excited to see how my colleagues across the agency support and uplift each other." Irene Matsuoka, Administrative Vice Chair of HAPI

We aim to improve employee experiences at Revenue, not only for HAPI members, but also for all.

Submitted by HAPI Marketing & Communications Vice-Chair.



PRISM

Members of the LGBTQIA+ community have always existed in the workplace, and the resources to support them are growing. In June, DOR welcomed a new Employee Resource Group named PRISM, which is focused on supporting the LGBTQIA+ community within the agency. Allies are explicitly welcomed and encouraged to join this group.

PRISM isn't an acronym, it just stands for you!

PRISM’s main goals include creating a safe community for folks to let their guard down, building connections across DOR, and continuing to evolve based on the group’s input.

Dontae Payne (Equity & Community Partnerships Manager) has stepped up to carry the flag as their executive sponsor, with Sam McMahan and Eli Charno as their co-leads.

Through advocacy and community building, they aim to create a supportive network that not only accepts, but honors different identities and orientations. These efforts will enhance organizational culture, drive innovation, and attract a wider range of employees.

Additionally, PRISM works with executive sponsors and other agency partners to advise and coordinate ways to support empowerment, employment, and retention, especially with the LGBTQIA+ community.

Submitted by PRISM leadership group.



VET support stands strong

Revenue continues to support its founding and award-winning

ERG, the Veterans Employment Team (VET), which was established in 2016 and stood 75 members strong in FY24. VET aims to recruit, retain, and recognize veterans.



Each year, the team rallies to raise money for the Puget Sound Honor Flight Network, which transports veterans for free to Washington, D.C. to visit and reflect at the memorials built in their honor. This year, VET raised \$1,175 toward Honor Flight’s mission.

The VET continues to be a model for Revenue, its employees, and for emerging ERGs.

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