



DIVERSITY, EQUITY, AND INCLUSION PLAN

ADOPTED | 2023-2027

Oregon Department of Revenue
Updated January 2025



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How We Partner with Sovereign Nations

Native American tribes hold unique political status and are recognized as sovereign governments. This sovereignty means that tribes have the authority to govern themselves, manage their own affairs, and make decisions independent of state laws. We recognize and respect the sovereign status of Oregon's nine federally recognized tribes and their respective authorities on tribal lands.

It is our policy to promote positive government to government relations through consultation with the tribes in areas where the development, implementation, and administration of agency programs may affect tribal members, lands, activities, or interests. We believe that continuing to build on our relationships with the tribes makes our agency more effective overall while supporting our work across the state and region.

Oregon personal income tax law relating to the taxation of Native Americans is found under ORS 316.777 and OAR 150-316-0595. This statute and the associated administrative rules exempt certain income earned by Native Americans in Oregon.

Oregon property tax law relating to the taxation of Indian properties is found under ORS 307.181 and OAR 150-307-0220. This statute and the associated administrative rules exempt certain properties from taxation.

Oregon laws relating to refund agreements with Indian reservations is found under ORS 323.401 and 323.615. These statutes authorize the Department of Revenue to enter into agreements with tribal governing bodies to refund a mutually agreed amount of prepaid cigarette or tobacco products taxes on sales to tribal members on the reservation. This provision is in addition to other laws allowing tax refunds.

Our Commitment

Together, we collect the revenue that Oregon counts on. Fulfilling this mission requires us to ensure dignity and inclusion for all. Inclusive practices help us understand and meet the unique needs of our customers. Our responsibility is to adapt our systems, policies, practices, and procedures to serve all our customers, and this plan is a testament to that commitment.

The department is committed to creating an inclusive environment where all employees are safe, regardless of their identity. We value the diversity of our employees and the communities we serve. By embracing diversity, we ensure that our organization reflects the community we serve.

Thank you for your dedication and support in making this plan a reality. Together, we will create a more inclusive and equitable environment for everyone we serve and work with.

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Introduction

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.

Equity is about creating the conditions for all to have access to the resources and opportunities they need to thrive, so identities cannot predict outcomes.

The diversity, equity, and inclusion plan incorporates the State of Oregon's diversity, equity, and inclusion strategies into the Oregon Department of Revenue.

Plan Update

This plan's actions have been modified to reflect updates based on available resources. Legislative requests for resources were not funded during the 2023 legislative session to support some of the work in the original plan. Progress on completed action items can be found on page 24.



Background

As described in the State of Oregon's 2021 Diversity, Equity, and Inclusion 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," Nonimmigrant 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. Using equity as a guiding principle means centering the needs of community members who have been historically underserved and underrepresented. In designing policies, practices, and processes that explicitly serve these culturally specific groups, the department can create conditions that benefit all community members. By improving outcomes for community members with the least access to resources and opportunities, the department is able to best serve all Oregonians.

Oregon's History

This plan acknowledges and makes visible many historic instances of oppression and violence in our state, specifically based on race and ethnicity. “The tax system is not race neutral, the tax system reflects the attitudes, the biases, and the economic interests of those who wrote the tax laws and for much of our nation’s history it has been white mostly well-off men.”¹

As depicted in the State of Oregon Diversity, Equity, and Inclusion Action Plan, the below timeline of Oregon’s history illustrates some, but not all, statewide and federal policies and actions perpetuating racial inequities

Year	Policies and Actions Perpetuating Racial Inequities
1790	Naturalization Act: This act prohibited non-whites from accessing U.S. citizenship 1790 by limiting it to white immigrants (primarily from Western Europe) who had resided in the U.S. at least two years and with children under 21 years of age. The act also granted citizenship to children born to U.S. citizens while abroad.
1844	Exclusion: The first Black exclusion law in Oregon, adopted in 1844 by the Provisional Government, mandated that Blacks attempting to settle in Oregon would be publicly whipped — thirty-nine lashes, repeated every six months — until they departed.
1855	Statehood: After the gold strikes in southern Oregon, pro-slavery forces advocated 1855 forming a new state in southern Oregon and northern California. It failed when Californians rejected the idea of reducing the size of their state.
1856	Rogue River Indian Wars ended with the surviving Native Americans sent to two newly 1856 created reservations: the Siletz and the Grand Ronde.
1857	State Constitution: The Oregon constitution, adopted in 1857, banned slavery but also excluded Blacks from legal residence, owning property, making contracts, voting, or using the legal system.
1859	Like earlier exclusion laws, the constitutional slavery ban adopted in 1857 took effect when Oregon became a state in 1859. It was not retroactive, which meant that it did not apply to Black people who were legally in Oregon before the ban was adopted.
1862	Color Tax: Oregon adopted a law requiring all residents who were Black, Chinese, Hawaiian (Kanakas), and Mulatto (an archaic term referring to people of mixed ethnic heritage) to pay an annual tax of \$5. If they could not pay this tax, the law

¹ [The Racist Roots of Oregon’s Tx System – Oregon Center for Public Policy](#)

	empowered the state to press them into service maintaining state roads for 50 cents a day. Also, interracial marriages were banned in Oregon. It was against the law for whites to marry anyone who was one-fourth or more Black.
1866	Miscegenation: Oregon banned all interracial marriages, extending the 1862 law to prevent whites from marrying anyone who was one-fourth or more Chinese, or Hawaiian, and one-half or more Native American. It was previously illegal for white and Black people to marry.
1867	School Segregation: Even though the total Black population in Oregon in the 1860s numbered 128, Portland assigned Black and Mulatto children to a segregated school.
1868	No Citizenship: The Oregon Legislature rescinded the state’s ratification of the Fourteenth Amendment, endowing African Americans with citizenship — this despite the fact that the amendment had just become federal law.
1875	Page Act: This law prohibited the importation of unfree laborers and women brought for “immoral purposes.” It was enforced primarily against Chinese due to anti-Chinese xenophobia around the U.S. as an early effort to restrict Asian immigration via select categories of persons whose labor was perceived as immoral or coerced.
1877	Military Action: The Nez Perce Tribe clashed with the U.S. Army in their Wallowa homeland in northeast Oregon. Chief Joseph and his people refused to go to a reservation. Instead, Chief Joseph tried to lead 800 of his people to Canada and freedom.
1879	Chemawa Indian Boarding School opened in Salem, Oregon as the third such boarding school in the nation. These schools were designed to assimilate Indian children into white culture and teach them vocational skills. Students were prohibited from speaking their Tribal languages or practicing any of their traditional customs or culture.
1880	By this date, the U.S. government had forced most Indigenous and Native people of the Northwest onto reservations.
1882	Chinese Exclusion Acts: Due to anti-Chinese xenophobia and bigotry, the federal government passed a 10-year moratorium on Chinese labor immigration, which was renewed in 1892 for another 10 years as part of the Geary Act. Chinese Americans already in the country challenged the constitutionality of the discriminatory acts, but the federal government did not listen. The exclusion law was made permanent in 1902 with added restrictions requiring Chinese residents to register and obtain a certificate of residence, or else face deportation. In China, merchants organized an anti-American boycott in 1905, which the American government pressured the Chinese government to suppress. The Chinese Exclusion Acts were not repealed until 1943.
1887	Violence and Intimidation: Of the many acts of intimidation and violence committed against early Chinese immigrants in the American West, one of the most brutal

	<p>occurred at Deep Creek on the Oregon side of the Snake River in Hells Canyon. In May 1887 as many as 34 Chinese gold miners were ambushed and murdered for their gold by a gang of horse thieves and schoolboys in Wallowa County. Of the six men indicted: Three men fled and were never caught, and three others were declared innocent by a jury on September 1, 1888. No one was found guilty of the crime.</p>
1919	<p>Redlining: Portland Board of Realty approved a “Code of Ethics” prohibiting realtors and bankers from selling property in white neighborhoods to people of color or providing mortgages for such purchases.</p>
1923	<p>Alien Land Laws: There was growing hostility towards Asian farmers, most notably Japanese farmers in the Hood River Valley. The Oregon Legislature, dominated by members of the Klan, passed a number of restrictive laws. The Alien Land Law prevented first generation Japanese Americans from owning or leasing land. The Oregon Business Restriction Law allowed cities to refuse business licenses to first generation Japanese Americans. Alien land laws grew in popularity in the West, even in states with very small, isolated Asian populations.</p>
1934	<p>Non-unanimous Jury Verdicts: Oregon voters amended their constitution to allow for non-unanimous jury verdicts in criminal cases. Its intent was to weaken the influence of non-white jurors.</p>
1935	<p>Segregation: Oregon law officially segregated Mexican students on the basis of being 1935 of “Indian” descent. It made clear to exempt “White Mexicans” those fair-skinned descendants of the Spaniards who do not have “Indian blood”.</p>
1937-1945	<p>Oregon passed a number of laws restricting Indians, mostly concerning the possession of alcohol.</p>
1942	<p>World War II (WWII): Japanese Americans started to lose their homes, livelihoods and freedom, and were forced to report to a facility to be relocated to inland internment camps for the duration of WWII.</p> <p>The Oregon Plan: In May 1942, Malheur County became the site of the first seasonal farm labor camp where internees went on leave from internment camps to work in the sugar beet fields. Numerous Japanese Americans remained in Malheur County after an order excluding them from the West Coast was lifted in January 1945, and remained in Malheur to build a sizeable Japanese American community in Ontario and Nyssa to this day.</p>
1945	<p>The Oregon House of Representatives passed a Joint Memorial calling on President Roosevelt to prevent the return of Japanese Americans “for the duration of the present war with Japan.”</p>

	Revision to Alien Land Law forbids Japanese nationals from purchasing or leasing land. ²
1948	Redlining: "Oregon realtors followed the "National Realtors Code" (based on an earlier state law) that proclaimed that a realtor shall never introduce into a neighborhood members of any race or nationality whose presence will be detrimental to property values." This practice continued until the 1960s, when the civil rights movement led to the Fair Housing Act and later, in 1977, to the Community Reinvestment Act, when the federal government began to address these racist wrongs. "But even then, communities of color – particularly African Americans – continued to be displaced as investments in urban renewal and community plans resulted in gentrification, which still occurs today."
1954	Treaty Termination: Congress terminated federal aid granted by treaties with 109 tribes, dissolving the Klamath, Grand Ronde, and Siletz reservations and sanctioning the selling of their Tribal lands. Tribes lost control of their land and water rights, oil, and other natural resources. The Secretary of the Interior was a former Oregon Governor.
1981	Two police officers dumped dead opossums at an African American-owned restaurant in Portland. The incident evoked ugly KKK imagery and touched off one of the most contentious disputes between police, city government, and the public. As a result, a citizen's committee to review police actions in Portland was created.
1994	Measure 11 was passed by Oregon voters to establish mandatory minimum sentencing for several crimes; it was reaffirmed in 2000.
2008	Oregon Driver's License Bill: SB 1080 was passed requiring all applicants for Oregon driver licenses, instruction permits, or identification cards to provide acceptable proof of U.S. citizenship or lawful presence in the country. This bill created significant hurdles for Oregonians, including citizens, to obtain driver license or identification cards.
2014	Measure 88 Defeated: The Oregon Alternative Driver Licenses Referendum subjected Senate Bill 833 to a popular vote through Measure 88. If it had been upheld, SB 833/ M88 would have made 4-year driver licenses available to those who cannot prove legal presence in the United States. The campaign opposed to the referendum was managed by Oregonians for Immigration Reform, an anti-immigrants' group in the state, as well as Protect Oregon Driver Licenses.

² [Tax Policy Through a Racial Equity Lens](#)

Recently, there has been policies and actions that have been taken to improve racial inequities. Some of those are listed below.

Year	Policies and Actions Improving Racial Inequities
2022	SB 1560 updates statutory references to individual who is not citizen or national of United States to replace "alien" with "noncitizen." ³
2023	SB 1 created the Voluntary Self-Identification (VSI) of race and ethnicity program to 2023 collect race and ethnicity information, which taxpayers and Oregonians can choose to submit with their tax return. This will make Oregon the first state to collect such information on tax returns. ⁴

³ [SB 1560 \(2022\) Enrolled](#)

⁴ [SB 1 \(2023\) Enrolled](#)

Action Plan

The department examined and applied the State of Oregon DEI Action Plan's ten strategies to the planning process.

Strategy 1 – Agency Specific Diversity, Equity, and Inclusion Plan

The Oregon Counts on Us: Oregon Department of Revenue 2022-2027 Strategic Plan affirms the organizational commitment to racial equity, 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.

Through the strategic planning process we learned that 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.

This Diversity, Equity, and Inclusion (DEI) Plan is a five-year plan. The DEI Plan will be monitored, evaluated, and updated in alignment with the agency's 2022-2027 Strategic Plan.

Action

- ❖ **1.1** – Continue the department's Revenue Committee on Diversity and Inclusion (RCDI). This committee acts as a steering committee for the Racial Equity Plan's action plan. The committee's mission is to foster a safe, diverse, and inclusive culture and improve equitable access to our services, programs, and resources for our employees and our customers.

Strategy 2 – Agency Diversity, Equity, and Inclusion Infrastructure

Department diversity, equity, and inclusion infrastructure is critical to the success of the implementation of DEI initiatives within the agency. The department embeds its DEI work across the agency to achieve its initiatives in this plan.

Actions

- ❖ **2.1** – Invest in data analysis to understand how our customers are experiencing the tax system. This will be done through our Customer Experience Center of Excellence (CxCOE).



Strategy 3 – Inclusive Communications

The focus for this strategy is to improve the accessibility of the department's programs, activities, materials, and media.

Actions

- ❖ **3.1** – Evaluate interpretation and translation service needs for each program. Determine gaps that exist and develop a plan for addressing gaps. To be considered for a future strategic plan.
- ❖ **3.2** – Assess communication materials for racial bias and review to ensure materials reflect the diversity of the community served.
- ❖ **3.3** – Ensure communications are accessible, are messaged in appropriate medium, use trusted messengers, are trauma-informed, and involve communities in the development of communications.
- ❖ **3.4** – Language matters, be intentional in the words we use to identify, assist, and move the work. This work will be done by continuing to educate staff on best practices and providing them the tools they need to succeed.
- ❖ **3.5** – Ensure the department meets Web Content Accessibility Guidelines (WCAG) 2.1 level AA accessibility requirements.

Strategy 4 – Community Engagement

We secured investments in our 2023-2025 budget for a community engagement program to provide outreach and opportunities for community members to be involved, collaborate, and co-create ideas and solutions with the department.

Actions

- ❖ **4.1** – Continue to actively listen to the concerns of community members and culturally-specific community-based organizations and invite them into the decision-making and budget processes. This will be done by reaching out before or after our community engagement events to ensure they are getting what they need and to receive feedback on how we can make improvements.
- ❖ **4.2** – Appoint advisory boards and community-based groups to provide guidance on budget, policy, and program development.
- ❖ **4.3** – Continue to ensure community-based organizations understand how to access and participate in decision-making and budget processes.
- ❖ **4.4** – Continue to ensure community-based organizations understand how to access services for their clients or community members. This is done by attending state and county fairs, Veteran Stand Down events, and other events to share information with organizations and community members.
- ❖ **4.5** – Continue the feedback loop that was created so information coming from communities is documented, shared with DOR leadership, and addressed. Communicate how Revenue incorporated community input back to the community.

Strategy 5 – Disaggregated Data as a Lever for Change

Confidentiality of taxpayer information and information security is critical to the work of the department. Under current law tax returns do not include race or ethnicity data. Tax policy analysis across such demographic groups is generally limited.

In 2021, the Oregon Legislature explored the possibility of the department allowing taxpayers to voluntarily report their race and ethnicity as they file an annual personal income tax form. Under Senate Bill 1569 (2021), the department would offer people a choice of race and ethnicity categories as developed by the Oregon Health Authority for use on their Race, Ethnicity, Language, and Disability (REALD) forms.

During the 2023 legislative session, the Oregon Legislature passed Senate Bill 1, creating the Voluntary Self-Identification (VSI) of race and ethnicity program. This law requires the department to offer people a choice of submitting data on their race and ethnicity, based on categories as developed by the Oregon Health Authority for use on their Race, Ethnicity, Language, and Disability (REALD) forms. The department created a form to collect race and ethnicity information, which taxpayers and Oregonians can choose to submit with their tax return, starting with tax year 2024. This will make Oregon the first state to collect such information on tax returns. The department has also provided a way for people who don't have a return-filing requirement, but would like to submit their race and ethnicity information, to submit that information separately from a tax return.

In January 2022, the department implemented a Racial Equity Impact Statement (REIS) process. It is important to examine and understand the impact that administrative actions and policy decisions have on affected customers. The racial impact statement process provides a way to formalize and focus analysis on communities that have historically been harmed by unintended impacts of administrative actions and policies.

Actions

- ❖ **5.1** – Prepare to collect customers race and ethnicity data since it has been authorized by the Oregon Legislature. This will go live for the 2025 tax season.
- ❖ **5.2** – Increase awareness of racial bias and equity impacts associated with new proposed revenue streams through conducting Racial Equity Impact Statements. This will be done by analyzing the process for effectiveness and providing training and guidance to employees on how to understand the impact of our decisions on underserved communities.

Strategy 6 – Equitable Budget, Inclusive Budget Process and Investing in Target Communities

The Oregon budget development process for the 2025–27 biennium changed in 2024. The instructions issued by the Governor’s Office and the Department of Administrative Services, Chief Financial Office (DAS CFO) instructed all State Agencies to work more collaboratively with both the Governor’s Office and DAS. Each State Agency met numerous times with their Governor’s Office policy advisor and their DAS CFO budget analyst to review, discuss, and ultimately get approval on all policy packages. This more integrated process allows the Governor’s Office to be a significant contributor to each agency’s budget request from the beginning of the budget development cycle.

Governor Kotek has been mission-focused on increasing housing production and serving the needs of unsheltered or housing-insecure Oregonians, improving education outcomes for our youngest learners, and increasing access to behavioral health services. Additionally, her overarching goals include advancing racial justice and equity and improving the customer service Oregonians receive from their state government. To achieve these fundamental goals, her office has asked that executive branch agencies also focus on these core priorities, implementing existing programs, and coordinating closely with the Governor’s Office to align our efforts during the upcoming legislative session.

To ensure there is a shared focus on ways government can best support low-income Oregonians and working families through more efficient program delivery, her office requests that agency budget and legislative requests continue to focus on improving core agency functions and deliverables (for example, information technology (IT), administration, etc.) to enhance customer service and outcomes. DOR has worked closely with the Governor’s Office and DAS CFO to ensure that its budget, including policy packages, advance customer service and improve core agency functions and deliverables.

Currently, the department is aligning with the Governor’s Office’s direction on which agencies are to involve communities in the budget process. We were not one of the agencies selected but we will be reviewing this selection with every budget cycle to ensure we are in alignment.

Actions

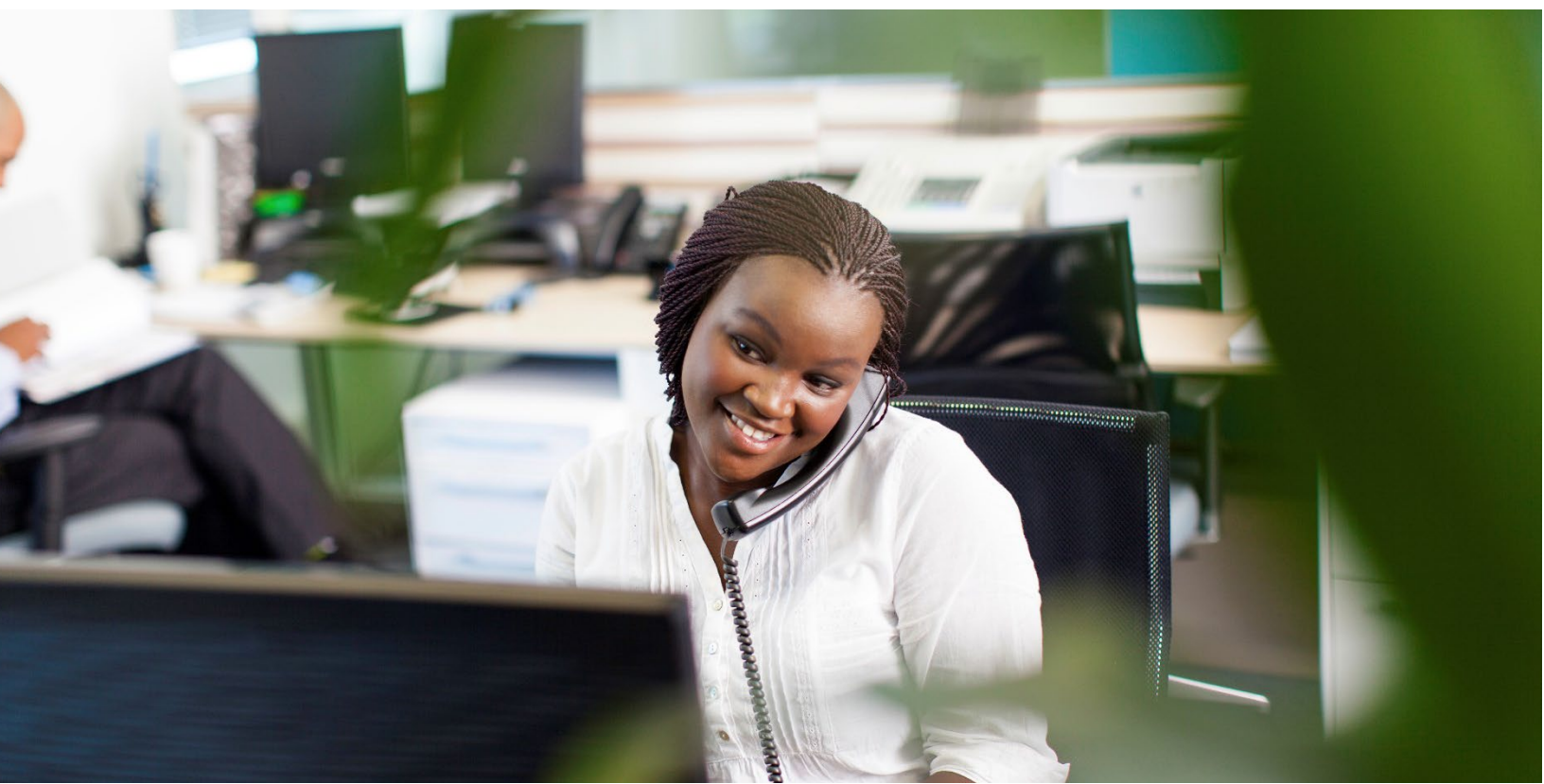
- ❖ **6.1** – Increase community engagement in the budget process.
- ❖ **6.2** – Incorporate feedback from community into budget requests and department operations.

Strategy 7 – Contract Equity and Improving Agency Procurement Processes

The department applies equitable contracting and purchasing practices to promote recovery and community economic development for minority-owned, women-owned, service-disabled veteran-owned, and emerging small businesses.

Actions

- ❖ **7.1** – Ensure practices are in place to increase contracting opportunities for minority-owned, women-owned, service-disabled veteran-owned, and emerging small businesses (MWESB).
- ❖ **7.2** – Conduct proactive outreach with the Office for Business Inclusion and Diversity (COBID) vendors in Business Oregon’s database when contracting opportunities are available. This process is integrated into our procurement staff’s procedures.
- ❖ **7.3** – Ensure that all procurement documents have a DEI (Diversity, Equity, and Inclusion) statement. This process is integrated into our procurement staff’s procedures.



Strategy 8 – Diversifying the Workforce and Creating an Inclusive Workplace

The department invested in additional Human Resources capacity to understand our hiring practices and employee experiences for community of color. We had previously only used disaggregated data by race to track and monitor hiring processes, including recruitment, interview procedures, and hiring outcomes.

Actions

- ❖ **8.1** – Create a recruiting and marketing strategy for hiring people from historically and currently under-served and under resourced communities in Oregon, those from non-traditional fields and academic programs, and any intersection of these.
- ❖ **8.2** – Continue to track, measure, and report changes in the demographics of agency employees to reach parity with the diversity of Oregon. Develop a dashboard to better understand and make decisions from the data.

Strategy 9 – No tolerance for Racism, Hate, and Discrimination

The department can help to ensure the safety of all Oregonians by protecting civil rights and taking active measures against harassment, discrimination, racism, xenophobia, stigmatization, violence, and hate crimes. Our agency's values include seeking dignity and inclusion for all, that includes not tolerating racism, hate, or discrimination toward our employees or our customers. The department has adopted clear processes for sharing and reporting racial discrimination complaints.

Actions

- ❖ **9.1** – Continue to ensure the agency has structures in place to provide all staff with safe space to communicate concerns or ideas related to equity. Continuously monitor practice to ensure employees have a safe space; review agency policy every three years.

- ❖ **9.2** – Continue to ensure a written and followed internal process for responding to acts of racial discrimination toward Revenue staff; with zero tolerance for hostility, macro or micro. Continuously follow our internal process for responding to acts of racial discrimination; review agency policy every three years.

Strategy 10 – Urgency, Transparency, and Accountability in All Operations

The department must put in place real accountability and transparency in our equity-driven work. Without these two things, it is all too possible to deprioritize the urgent needs based on budget cycles and limited resources. Conditions will never be perfect. And while conditions may improve in the budget and through enterprise-level efforts, we must act on what we can do right now to reduce harm and help the people we serve.

Actions

- ❖ **10.1** – The department develops, tracks, measures, and analyzes performance and progress towards equity actions in the DEI Plan. This is done monthly by meeting with the responsible parties and updating the action plan.
- ❖ **10.2** – The department reports on its progress towards taking the actions in the DEI Plan. This is done yearly through annual reports.

Monitoring and Evaluating

Our DEI planning lifecycle will align with the department's 2022-2027 Strategic Plan lifecycle including the responsibilities and frequencies of monitoring and evaluating the implementation of the plan throughout the life of the plan.

The strategic planning coordinator shall report quarterly progress to the Revenue Committee on Diversity and Inclusion (RCDI). The strategic planning coordinator shall report annually to the Revenue Leadership Team on progress and accomplishments.

The agency has included many of these strategies and actions in its Affirmative Action Plan to ensure alignment across all strategic documents and clarity in our goals and focus.

Monitoring and Evaluating Schedule

- Progress reports shared internally January, April, July, and October each year of the plan.
- Annual Reports will be created in February of every year of the plan.
- Plan actions will be updated in March of 2024 and 2026. New actions will be adopted in September of 2024 and 2026.
- The plan will be updated in September of 2027 and adopted in 2028.

2023-2024 Accomplishments

The following DEI Plan action items have been completed.

- 1.1 Restart the department's Revenue Committee on Diversity and Inclusion (RCDI).
 - The RCDI was restarted in January 2024 and has been meeting monthly. Quarterly, the committee discusses and reviews progress on action items in this plan. The committee's mission is to foster a safe, diverse, and inclusive culture and improve equitable access to our services, programs, and resources for our employees and our customers.
- 2.1 Invest in Human Resources' capacity to understand how our hiring practices and employee experiences impact communities of color.
 - Human Resources secured resources to support this work through the 2023 legislative session. This work will be accomplished through Strategy 8's actions.
- 2.3 Review and improve the Oregon Department of Revenue's external website navigation, level of program information provided, program contact information, and forms searchability.
 - Communications completed an external website migration to create a more modern, lean, and user-friendly customer experience with our website.
- 3.1 Language access and literacy: Ensure multilingual Oregonians with limited English proficiency (LEP) and English language learners (ELL) have access to translated material in appropriate languages.
 - The agency currently offers written and verbal translation services as needed. This item is complete and is now incorporated into our normal work functions.
- 3.3 Translate important information and guidance in a timely way. Information should be communicated clearly, in ways that are culturally and linguistically responsive to the intended community.
 - The agency currently offers written and verbal translation services as needed. The agency has a committee of bilingual employees who meet regularly to review and assist with translations. This item is complete and is now incorporated into our normal work functions.
- 3.4 Shift focus from written to spoken word and other ways of sharing information: Language access also means not always relying on the written word to convey meaning, so consider video and audio recordings for communities who cannot read or write.
 - This is done through the agency's social media platforms and providing information on the agency's website. This item is complete and is now incorporated into our normal work functions.

- 3.7 Align messaging with other agencies for mutually reinforcing vision and language about successes to set up the kind of repetition that is needed for people to feel the change happening and spread the word.
 - Communications aligns its messaging with the Department of Health Services (DHS), the Department of Employment, other agencies. The team also participates in task forces to hear and share messages. This item is complete and is now incorporated into our normal work functions.
- 3.9 Language matters, be intentional in the words we use to identify, assist, and move the work.
 - Communications updated the agency's written style guide that incorporated greater guidance on language within it. The team also created a writing training that is available to agency staff.
 - Human Resources provided information and instructions to agency staff on Microsoft's accessibility tools.
- 4.1 Create infrastructure that actively listens to the concerns of community members and culturally-specific community-based organizations and invites them into the decision-making and budget processes.
 - Communications has created and integrated this infrastructure into their current processes by sending out a survey or messages after community engagements. The team actively asks communities what they need prior to conducting outreach. This includes how best to share the information and in which media.
- 4.2 Create a community engagement team to engage with community members and culturally-specific community-based organizations.
 - Communications updated the agency's interested party list and made it easily available for agency staff. This list will be updated regularly. A cross-divisional team was also created, and they meet regularly to work on outreach efforts.
- 4.5 Ensure community-based organizations understand how to access and participate in decision-making and budget processes.
 - The agency has aligned with the Governor's Office direction on which agencies are to involve communities in the budget process. Our agency was not selected and will continue to review this direction with each budget cycle.
- 4.6 Ensure community-based organizations understand how to access services for their clients or community members.
 - Communications has integrated this action item into their current processes which is done through their community engagement events. The team provides information and handouts on different tax programs to help community members understand how to access benefits. The team also added a toolkit to the agency's external site so any community members who are not able to attend the engagement events can access the

information. The site also has translated materials available to community member who may need it.

- 4.7 Create a feedback loop so information coming from communities is documented, shared with DOR leadership, and addressed. Communicate how Revenue incorporated community input back to the community.
 - After community engagement events, Communications sends out a survey or message to receive feedback. The team also developed and uses a community engagement plan template to plan out the events and ensure the feedback is shared, addressed, and communicated on every community engagement project.
- 6.1 Increase community engagement in the budget process.
 - The agency has aligned with the Governor's Office direction on which agencies are to involve communities in the budget process. Our agency was not selected and will continue to review this direction with each budget cycle.
- 6.2 Incorporate feedback from community into budget requests and department operations.
 - The agency has aligned with the Governor's Office direction on which agencies are to involve communities in the budget process. Our agency was not selected and will continue to review this direction with each budget cycle.
- 8.1 Review and update position descriptions to include state equity vision, values, and goals and use gender neutral language.
 - Position descriptions were to be updated by January 31, 2024. The agency's Human Resources has conducted an audit and determined 75 percent of position descriptions are updated. The team will continue to work with managers to ensure all position descriptions are updated.
- 8.2 Build a comprehensive, inclusive, and accessible employee training program that enhances recruitment and retention, and positions employees to achieve success, including opportunities for promotion.
 - The agency completed this work through one of its strategic plan projects by creating a training list per classification and posted it for access to all staff on the agency's intranet. The agency also procured LinkedIn training and diversity, equity, and inclusion training and posted them on intranet, as well as launched a mentorship program.
 - Each division created onboarding plans and checklists for new employees.
- 8.3 Create career development pathways for current employees, and knowledge retention and transfer processes for new employees.
 - The agency completed this work through one of its strategic plan projects by creating a list of critical positions, updating procedures and workflows for areas of unique knowledge or experience in the agency, and creating cross-training and succession plan for highly technical positions.

Conclusion

We are committed to diversity, equity, and inclusion.

We are committed to transparent communication regarding the progress in this plan. Internally, updates are shared quarterly with the agency's Revenue Committee on Diversity and Inclusion (RCDI) and director. These quarterly meetings are essential in reviewing the progress achieved, discussing challenges, and planning future actions. The involvement of the director ensures the progress is monitored at the highest level, fostering accountability and strategic oversight.

Externally, we communicate this plan's progress to our partners and customers through our annual reports. These comprehensive documents provides a detailed overview of the year's achievements and future plans. By sharing this information externally, we aim to provide transparency and build trust with our partners. The annual reports serve as an essential tool for sharing our commitment to diversity, equity, and inclusion and our ongoing efforts to address systemic inequalities.

Appendix

[Oregon Counts on Us: Oregon Department of Revenue 2022-2027 Strategic Plan](#)

[State of Oregon Diversity, Equity, and Inclusion Action Plan: A Roadmap to Racial Equity and Belonging](#)