



2017-21

*Strategic Priorities*



O R E G O N   D E P A R T M E N T   O F   R E V E N U E





*The Oregon Department of Revenue* started as the Oregon Tax Commission in 1909. The agency has approximately 1,000 employees who help achieve its mission of *making revenue systems work to fund the public services that preserve and enhance the quality of life for all citizens.*

Each  
biennium, more  
than 95 percent of  
Oregon's General Fund  
is attributable to the work  
done by the Oregon  
Department of  
Revenue

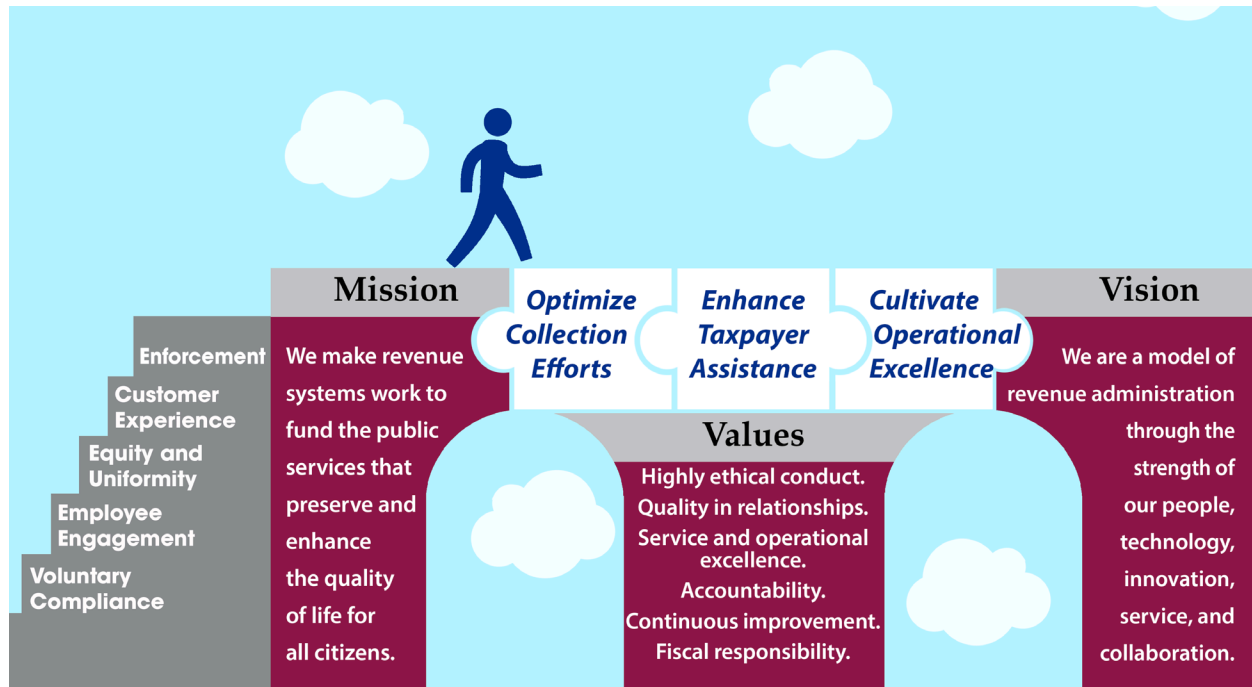
### *In support of its mission, the agency:*

- Administers nearly 40 tax programs, including Oregon's personal income, corporate excise, recreational marijuana, and cigarette and other tobacco tax programs.
- Supervises the state's property tax system and supports county property tax administration.
- Appraises large industrial and centrally assessed properties.
- Administers tax programs for other state agencies and local governments, including the state lodging tax, vehicle privilege and use taxes, local marijuana taxes, and transit district taxes.
- Serves as the primary collections agency for executive branch agencies and state boards and commissions.



Tax administration functions include: processing returns and payments, assisting and educating taxpayers, auditing, enforcing state tax laws, collections, and policy development.

# Strategic Framework



*Looking forward*, the agency's vision is to be a model of revenue administration through the strength of our people, technology, innovation, service and collaboration.

*When pursuing its mission and vision, the agency is guided by its values:*

- **Highly ethical conduct**  
Honesty, fairness, and courage to do the "right" thing to protect integrity at the highest level.
- **Service and operational excellence**  
Doing our part, supporting others' success and pursuing ways to improve service delivery.
- **Fiscal responsibility**  
Prudent stewards of public dollars, effective financial controls, and information transparency.
- **Quality in relationships**  
Respectful, supportive, and authentic collaborators.
- **Accountability**  
Deliver on our commitments to establish credibility and trust.
- **Continuous improvement**  
Monitor performance, be open to change and reinforce a continuous improvement mindset.

## Core Business Outcomes

During the 2013–15 biennium, five outcome areas were identified as being critical to the agency’s success—voluntary compliance, enforcement, employee engagement, customer experience, and equity and uniformity. The five outcome areas allow divisions to align the work they do to important shared agency outcomes.

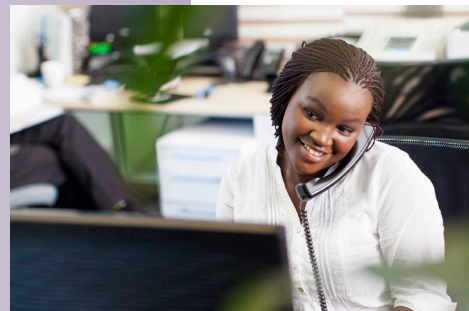
### **Employee engagement**

We engage employees so they care about their work and the performance of the organization by investing in them, creating a workplace that allows them to thrive, and ensuring they have the tools and skills they need to do their jobs.



### **Customer experience**

We work toward creating quality customer experiences by providing taxpayers with clear, accurate, and timely information and services, and leveraging technology to improve business processes and electronic self-service options.



### **Voluntary compliance**

We encourage voluntary compliance with Oregon’s tax laws by providing taxpayers with resources and information they need to file and pay appropriately.

### **Enforcement**

We use the enforcement tools available to us to promote long-term voluntary compliance and collect debts owed to the state.

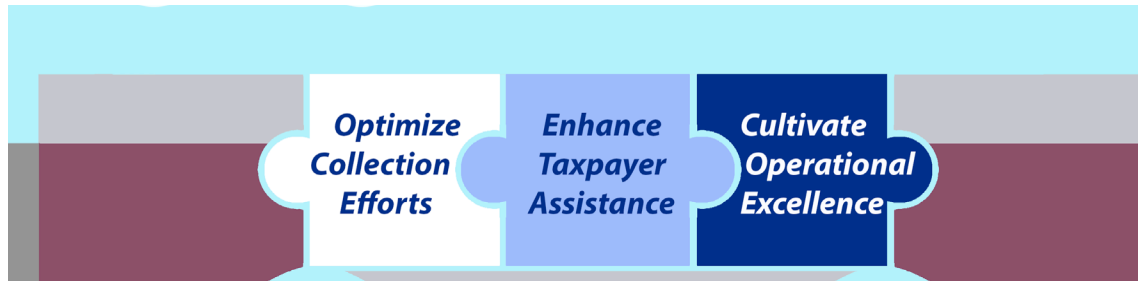


### **Equity and uniformity**

We apply tax laws and rules consistently across tax programs and treat all taxpayers fairly and equitably.

# Strategic Priorities

There were a number of factors that influenced the selection of the agency's 2017–21 strategic priorities, including new agency leadership, legislative budget notes, the implementation of five new tax programs over the past two biennia, a renewed emphasis on outcome-based management practices, and completion of a four-year core systems replacement project in July 2018.



- Enhance collection processes and tools to improve timeliness, accuracy, and results.
- Effectively frame and communicate the agency's debt collection potential and results.
- Develop understandable, useful, and focused metrics to support effective collections management.



- Ensure taxpayer assistance tools are easily accessible, customer focused, and work as intended.
- Establish service standards, align processes, and educate staff to achieve more timely service.
- Leverage information from customer feedback channels to better meet customer needs.



- Balance maximizing productivity with engaging employees.
- Develop metrics and other tools to enhance agency performance management, guide decision-making, and support continuous improvement.
- Establish an agency-wide governance framework that clarifies roles, responsibilities, and communication expectations.



# Progress to Date

## Optimize Collections Efforts

- Successful consolidation of statewide collections efforts under the department's Other Agency Accounts program [SB 1067 (2017)].
- Effectively executed legislative direction to create a separate Collections Division, adjusted the budget structure appropriately, and hired an administrator, who will focus on optimizing collections efforts.
- Implemented financial institution data matching program to improve the garnishment process and collections results [SB 254 (2017)].

## Enhance Taxpayer Assistance

- Improved data collection and reporting activities related to customer service.
- Formed a team to identify improvements, implement recommendations, and enhance standardization of service.
- Established a new call center in Fossil.
- Reviewed the agency's phone system and implemented improvements to make it easier and quicker for taxpayers to reach a representative or find information.

## Cultivate Operational Excellence

- Contracted with a third-party consultant to conduct a current state assessment and develop a work plan to create an integrated performance management system.
- Reviewed agency positions to ensure jobs aligned with budget expectations and statewide personnel policies and procedures were followed.
- Received validation through a Secretary of State audit that the core systems replacement project was effectively executed and the tool, GenTax, is appropriately processing tax returns.
- Completed phase one of a three-year document processing system upgrade. This upgrade will increase efficiency and accuracy by automating many of the Processing Center's activities.





For more information on the work of the Department of Revenue,  
visit [www.oregon.gov/dor/about](http://www.oregon.gov/dor/about).