



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
8/8/2024

Agency: Department of Revenue

Facility: Collections

☐ New ☒ Revised

This position is:

- ☐ Classified
☐ Unclassified
☐ Executive Service
☒ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

a. Classification Title:	Revenue Supervisor 1	b. Classification No:	X7747
c. Effective Date:	7/1/2011	d. Position No:	6562
e. Working Title:	Financials Unit Manager Operations, Policy and Systems	f. Agency No:	15000
g. Section Title:		h. Budget Auth No:	001050520
i. Employee Name:		j. Repr. Code:	MMS
k. Work Location (City – County):	Salem Marion		
l. Supervisor Name:	Debbie Love-Wagner		
m. Position:	<input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share		
n. FLSA:	<input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	If Exempt:	<input type="checkbox"/> Executive <input type="checkbox"/> Professional <input checked="" type="checkbox"/> Administrative
		o. Eligible for Overtime:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Mission of the Department of Revenue is “Together, we collect the revenue that Oregon counts on.” Our Vision is to create a clear and easy experience for our customers. This position is with the Collection Division of the Department of Revenue. The division has program responsibility for the collection of delinquent tax for the personal income tax program, which is the major source of revenue for the state General Fund. The division also collects delinquent business taxes, including the Withholding, Corporate Income and Corporate Activities tax, Marijuana and other small tax programs. Employers, businesses, other state agencies and individual taxpayers are impacted by this division’s work. The personal income tax program impacts over 2.2 million taxpayers and generates nearly \$16 billion for the state General Fund per biennium. Delinquent tax collections total over \$400 million a biennium. The division is also responsible to collect on behalf of other state agencies, boards and commissions, local governments and others through its Other Agency Account Unit (OAA). OAA collects approximately \$100 million in delinquent accounts owed to 180 other entities. The division’s budget is approximately \$55 million total funds per biennium and provides for approximately 250 full-time equivalent positions.

State of Oregon DEI Vision, Values, and Goals

Vision

Within this context of historical harms, changing demographics, intersectional identities, and more; our vision for the next five years and beyond is to:

Dismantle institutional and structural racism in Oregon state government, and by doing so, have resounding impacts on the communities of our great state.

Build a more equitable Oregon where everyone has the opportunity to thrive and everyone's voice is heard.

Ensure an inclusive and welcoming Oregon for all by celebrating our collective diversity of race, ethnicity, culture, color, disability, gender, gender identity, marital status, national origin, age, religion, sex, sexual orientation, socio-economic status, veteran status, and immigration status.

Values

Putting racial equity at the forefront while understanding intersectionality. We must be bold and put racial equity at the forefront as a primary and pervasive location of oppression that connects with and worsens other identity-based inequities.

Prioritize equity, anti-racism, and racial justice actions. Commitment to prioritizing equity and eliminating racial disparities involves taking action in our policies, budgets, decision-making, and daily work.

Foster internal and external partnerships. Across the state enterprise and other institutions, community-based organizations are crucial to achieving racial equity. True partnership means shared power, listening, resolving tensions by creating solutions together, and scaling up what already works well.

Ensure collective responsibility and accountability. As public servants, we have a collective responsibility at every level of government to proactively reduce racial disparities and barriers. We must establish measurements of success so that we can ensure improvements are real and ongoing.

Goals

1. Establish strong leadership to eradicate racial and other forms of disparities in all aspects of state government.
2. Center equity in budgeting, planning, procurement, and policymaking.
3. Strengthen public involvement through transformational community engagement, access to information, and decision-making opportunities.
4. Improve equitable access to services, programs, and resources including education, health, housing, human services, environmental justice, criminal justice, and economic opportunities.
5. Foster an inclusive workplace culture and promote equitable hiring, retention, and promotion practices.

This position is in the Collection Division of the Oregon Department of Revenue in the Operations Policy and Systems Section.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Support and carry out the agency's and the Collection Division's mission, vision, and strategic plan following established department policies and procedures. Manages, plans, directs and monitors the activities, staff and resources of the Financials Unit. The Financials Unit is made up of Revenue Agents 1 and Revenue Agents 2. These positions handle hardship collection cases, skip trace functions and collection of both tax and non-tax accounts. This is done by direct

supervision of unit staff and day-to-day operations through assigning and reviewing work, developing work procedures consistent with established agency policy, state and federal laws and regulations, and procedures related to the collection of debts owed other state and local agencies. This position leads staff in communicating accurate legal obligations, rights, and consequences of notices, billing, and assessments. Provides direction and guidance on appropriate legal actions for complex tax and collection cases. Approves or denies corrective actions against our customers. This includes monitoring work performed by subordinates to meet compliance with established goals, objectives, timelines, state and federal laws, and rules and regulations. Decisions made in this position may impact state revenues.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.			
50%	NC	E	<p>Supervises the unit staff. Sets employee performance goals and objectives. Evaluate current business and system processes. Monitors unit budget for maximum operational efficiency. Reviews and interprets GenTax and PowerBI reports related to work of the unit. Reviews performance data to monitor and measure unit personnel productivity, goals, and progress.</p> <p>Schedules work assignments, assigns priorities and ensures they are met. Balances workload and reviews completed work of unit personnel to ensure clarity, completeness, accuracy, and conformance with unit, division, and agency policies. Clearly communicates department and division goals and objectives to unit staff.</p> <p>Establishes written unit expectations for all employees and communicates them both orally and in writing.</p> <p>Timely conducts quarterly check-ins for all employees. Individual performance standards and expectations are monitored and referenced in Quarterly Performance Accountability and Feedback meetings and discussed throughout the year.</p> <p>Ensures that a review of each employee’s caseload is performed on a regular basis. Addresses performance deficiencies in a timely manner. Uses the standard of progressive discipline according to the Collective Bargaining Agreement.</p>

			<p>Takes an active role in creating a harassment-free and safe workplace. Takes personal responsibility for enhancing workplace diversity and achieving the agency's affirmative action goals.</p> <p>Identifies employee development needs for each employee. Facilitates the coordination of training, special projects or assignment and other opportunities to promote continuous improvement in unit employee knowledge and skills.</p> <p>Conducts routine personnel actions affecting unit personnel, including interviewing, hiring, training, disciplinary actions, merit ratings, and performance appraisals. Interviews in a manner consistent with personnel rules, affirmative action goals, and established EEOC guidelines.</p> <p>Arranges and oversees training of newly hired personnel and conduct update training of unit personnel regarding new policies and procedures brought about by changes in federal and state statutes, regulations, Attorney General opinions, or DOR policy and procedures.</p> <p>Serves as a member of Operations, Policy, and Systems section leadership to provide input to the OPS section manager concerning changes to unit operations; development and achievement of section goals and objectives; and coordination and prioritization of the handling and processing of accounts. Responsible for engaging unit and section employees in initiatives and activities designed to accomplish the objectives of the section, division and agency.</p> <p>Serves on numerous division leadership committees and management groups and other teams, coordinating efforts, interpreting division policies, identifying and resolving division or agency-wide problems.</p> <p>Responsible for coordination of policies among and between units within and outside of the section such as Combo Agent work (tax and non-tax collectors) and the Financial Statement team work with other sections within the Division.</p>
45%	NC	E	<p>Responsible for developing and maintaining a process(s) or system(s) that ensure the following technical functions are adequately provided for unit personnel:</p> <p>Interprets, reviews, evaluates, and recommends change to collections and the Settlement Offer process. Communicates appropriate information internally to staff and management.</p> <p>Ensures that unit personnel properly explain to individuals,</p>

			<p>employers, agencies, and their representatives what their legal obligations are, rights and consequences regarding collection activity.</p> <p>Approves or denies the issuance of monetary penalties, garnishments & account maintenance adjustments when outside of normal processes. On more difficult cases, assists unit staff when conferring or corresponding with attorneys, individuals, county clerks, county courts, and government officials concerning collection activity. Interprets and explains pertinent federal and state statutes, rules and regulations, Attorney General opinions and instructions, and DOR rules and regulations. Advises staff on proper analysis of financial statements to determine the collection potential of delinquent accounts in hardship situations following agency administrative rules, policies and procedures.</p> <p>In consultation with the section manager or Operations, Policy and Systems personnel, advises unit staff on the appropriate action to take on complex, unprecedented or other problem cases. Determines if the staff's course of action is legal and proper.</p> <p>Monitors and identifies system problems and recommend corrective action to the OPS Section Manager. At times, makes recommendations for changes in parameters that control the system.</p> <p>Reviews and identifies legal questions and passes along to the OPS Section Manager.</p>
5%			Other duties as assigned.
100%			

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Normal office conditions. Work is normally performed by sitting at a desk for a duration of six hours per day, up to two hours at a time. Occasional contact in person or by telephone with uncooperative or hostile persons who owe a debt to the state of Oregon. There is exposure to people and noise in an office setting. Extensive use of a telephone. Occasional travel is required.

SECTION 5. GUIDELINES

6. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

- Oregon Revised Statutes and Administrative Rules
- Oregon Accounting Manual
- Internal Revenue Code and Regulations
- Personnel rules and collective bargaining agreement
- Department of Revenue Policies and Procedures including desk procedures
- State and Federal Court Decisions and disclosure laws
- Attorney General advice

b. How are these guidelines used?

- Used to understand and explain the complexities of collecting of state debt to agents/employees, attorneys, CPAs, employers, and the general public.
- Referred to for proper handling of confidential information and debtor related documents
- Referred to for proper handling of grievances and discipline
- Referred to for proper legal handling of personnel issues within the unit
- Assure actions of self and subordinates follow expected agency behaviors

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
Taxpayers/debtors; General Public; Employers; Attorneys; Corporation Officers; Federal, State and Local Agencies	Phone, Mail, In Person	Resolve program issues and questions	Daily
Other Collections Division Managers	Phone, Mail, In Person	Plan use of resources and ongoing Management Resources	Daily
Other Department Supervisors	Phone, Mail, In Person	Coordinate activities that impact other divisions	Daily
Division Management Team	Phone, Mail, In Person	Review program goals and policies	Weekly
Section Personnel	Phone, Mail, In Person	Inquire of and discuss/revise actions	As Needed

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Personnel decisions including hiring, discipline, terminations of staff, etc.

Decides priorities and assigns workloads to obtain maximum utilization of unit staff. An incorrect decision could affect revenues.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".		
Collections Financials Team	\$5000	General Funds/Other Funds

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Appointing Authority Signature

Date