

Summarize the nominee's 2022 accomplishment. Provide a brief narrative that may be used for public purposes. (300 word limit)

In 2021, legislation required the Dept. of Revenue to move forward implementing and administering the new Working Families Tax Credit (WFTC) program. The program is designed to stimulate the local economy, promote racial equity, and support the financial stability and well-being of low-to-moderate income Washington residents and their families.

The nominee's knowledge as a long-time Revenue employee and experienced program manager, coupled with their calm and compassionate demeanor, made them the perfect fit as WFTC's assistant director (AD). With this leader's laser focus as a beacon, the teams stood up an entire program and successfully met and exceeded the first-year participation goals in less than two short years.

This person quickly learned the intricacies of a new tax credit, nuances of federal statutes, and complexities of the internal software used to manage this program. When presented with data and issues for the first time, they absorb the information, ask relevant questions, and chart a course for resolution. When asked pointed questions by executive staff, external stakeholders, the press, or legislators, they consistently provide thoughtful, comprehensive answers.

The WFTC program serves a new customer base for Revenue, a change that the AD handled with expert care. However, customer service is not new, and is a source of pride at Revenue, and the AD leaned into the agency's principle of building relationships to empower success. Starting with their teams, the AD promoted innovation, allowed the team experts to apply their diverse skills, and offered support each step of the way. This trust and enthusiasm rippled throughout the division, and in turn, to the communities WFTC serves.

Since launching in February 2023, WFTC has refunded over \$90 million to more than 125,000 individuals and families—our fellow Washingtonians who need it most.

Select area(s) of impact:

[Results for the public](#) Employee performance [Pro-equity](#) [Anti-racism](#)
[Organizational development](#) Risk Management Budgetary or Fiscal

Who does the area of impact affect?

Only their agency [Agency Customers](#) [Enterprise-wide](#) [General Public](#)

What are the tangible outcomes in their area of impact? How does the nominee achieve results? (300 word limit)

According to the Office of Financial Management, around 10.2% of Washington's population – about 752,000 people – were living below the poverty line in 2020. Under the WFTC program, it was

estimated that up to 400,000 Washingtonians would be eligible to receive a tax credit between \$300 and \$1,200.

At the time of this writing, just four months since launch, the program has served more than 40% of that population and exceeded its first-year goal.

Here are some numbers:

- Total applications received: 178,559
 - Online using the agency's MyDOR portal: 71,843
 - Tax Preparation Software: 100,337
 - Paper applications: 6,379
- Total individuals/families paid: 126,186, additional 52,373 in process
- Total dollars refunded: \$90,984,145
- Average refund amount: \$707

To prepare for that massive lift, the AD directed teams in the following:

- Completing 600 project action items.
- Developing 500 business rules for systems processing.
- Testing 4,300 different user scenarios.
- Conducting more than 300 outreach engagements and events around the state.
- Submitting more than 400 translation requests for language access activities.

All these numbers point to one thing—strong leadership and highly capable staff. The nominee would humbly give credit to the teams and agency before themselves. Growing their team from four people to more than 50 took incredible skill, grace, and trust. The agency as a whole has witnessed these characteristics, and the benefits of this leadership style are recognized as exceptional. This leader also had the sound judgement to enlist the help of an organizational change management partner, which took weight off teams and added outside perspective.

They're also the first to recognize that while the WFTC launch was successful, much work can still be done to enhance the program, making it even more accessible for more people. This is a matter of equity, and they are not afraid to roll up their sleeves.

Describe any challenges the nominee has overcome. (300 word limit)

There's no shortage of challenges when standing up a new program—especially one with such a high degree of impact and such engaged stakeholders. The first challenge addressed was the fact that WFTC would be serving a new customer base.

Through this person's thoughtful leadership, the agency first took a step back to recognize that Revenue had limited knowledge, experience, and relationships related to those who would benefit from the tax credit.

This where the AD leaned into learning. Seeking guidance from other state agencies that administer public benefit programs was instrumental in getting WFTC off the ground. These partners shared best practices, promoted the program, coached leaders, and guided Revenue along the way.

From there, the AD ensured WFTC employees received in-depth training on how to empathize and best interact with Revenue's new customers. To take it even further, WFTC stood up an outreach team of bilingual communications consultants who developed strong ties to the communities they serve, building trust in the program and the agency.

Another challenge was working closely with a third-party advocacy group. This is perhaps the most involved collaboration Revenue has experienced with an outside party. This leader expertly blended the WFTC's fiduciary, stewardship, and integrity practices with the advocacy group's vision of program administration. It is the opinion of both parties that the program and the relationship are stronger due to the intentional interactions between the AD, WFTC teams, and the advocacy coalition.

These challenges and lessons resonated with the executive team, and Revenue looks to WFTC and its AD as a leader for organizational change management, team development, and inclusive contributions.

How does this accomplishment showcase the nominee's commitment to equity and inclusion?

Advancing racial equity is a prime objective of WFTC, and the AD took this to heart. Establishing an advisory board to include people with lived experience ensures two-way communication behind-the-scenes as pivots happen and priorities shift. WFTC's philosophy embraces the idea that no policy should be acted on without direct participation of community members affected by that policy.

To prepare teams, and in the spirit of true public service, the AD started with expanding knowledge of the communities served. This approach included a Bridges out of Poverty training and a live, in-person Poverty Simulation, hosted by Dept. of Commerce.

"It seemed like everything was working against them and not with them. Having gone through this exercise made me realize that my job is more than just visiting communities and talking to people. It's about listening, understanding, sympathizing, and making sure the individuals looking for a little bit of assistance receive that, and more." – Poverty Simulation participant

The WFTC team includes eight certified bilingual specialists, helping create one of the most diverse divisions in the agency. WFTC's language access plan includes providing materials in 12 languages. Numerous team members are part of Revenue's Inclusion, Diversity, and Equity Committee, and participate in state Business Resource Groups. One manager is a respected member of Revenue's (Pro-Equity Anti-Racism) PEAR team.

The AD also weaves inclusive decision-making into their leadership style. As someone who values open feedback loops, this leader ensures their team members are the ones who shine, both around the table and through recognition. One team member who works closely with the AD had this to say: “One of the greatest things about [this person] is that they trust their team to make decisions and do the work. They always collect feedback and ideas from others to make the best possible decision.”

With this accomplishment, how does the nominee prioritize care and development for their peers? How do they foster and build relationships? (300 word limit)

While it was tremendous work to rapidly hire 50 people, it took much more than filling seats to build a division—it took building a culture. Part of that was established simply through WFTC’s mission, opening the door to a lot of passionate people. Those hired came in with a strong sense of purpose and belonging. The AD worked to enhance that energy, like encouraging employee-led engagement activities. Staff responded enthusiastically—from bake sales to matching t-shirts, the brand-new division found its legs through genuine curiosity and care.

In tandem with relationship-building was development. The teams went through trainings together to help improve customer experience—like best practices for using over-the-phone interpretation services, plain language training, and more.

From there, leaders began to emerge. In addition to some of the DEI efforts spearheaded by the teams, such as continued diversity trainings and language access efforts, several folks expressed a desire to foster team building and establish their own sub-culture as the newest division to the agency.

An employee-led social committee and recognition program have been huge successes for the team. The recognition committee created several different categories to recognize individual staff achievements, team efforts, and celebrate the support of key agency partners.

The nominee has supported and expanded these efforts and plans to host a division-wide recognition event in September, to pass out awards, and celebrate staff for their continued contributions.

How does the nominee model effective communication? Explain how this helps foster teamwork and collaboration. (300 word limit)

“[This person] never hesitates to show appreciation for staff, and they consistently strive to lift us up with positive words and praise. They tackle even the most difficult discussions with a positive attitude, and I greatly appreciate that about them.” – WFTC program coordinator

Recognition and positivity go a long way in fostering teamwork, and naturally progress to collaboration. Employees feel safe under this employee’s steady leadership, and therefore empowered to use their sound judgment and expertise. When multiple people in the room tap into that innovation and strength, the magic of collaboration and problem-solving happens.

The AD has been described as someone “who doesn’t get lost in the keystrokes” and can take a step back to see the larger perspective when communicating to their teams. This person intuitively guides their teams through active listening, critical thinking, and unwavering leadership. They are continuously transparent and solicit feedback on a regular basis. Modeling these characteristics has shown the value of reaching out to others to collaborate—including to the diverse talent of employees across the agency.

Through this accomplishment, please describe how the nominee's team experienced growth. List promotions of former team members, how they've helped others learn new skills, or supported individuals on taking on new challenges. (300 word limit)

Many changes took place during implementation, including staff numbers growing from a mere four people to more than 50. But they didn’t just grow in numbers, they grew as individuals. The aforementioned training and team building activities brought out professional qualities, and a number of employees were supported on their way to promotions.

- One team member originally joined WFTC as a Public Benefit Specialist (PBS) 2 in the call center. They recently promoted to a PBS4 lead position on the compliance team.
- Another originally joined WFTC as a PBS3 in the call center. They were recently promoted to the call center supervisor.
- One team member joined WFTC as a non-perm Administrative Assistant (AA) 3 and recently promoted to the AA5.
- And yet another joined WFTC as a non-permanent outreach liaison, who was recently appointed a full-time permanent position.

To celebrate, Revenue hosted a recognition event, where WFTC team members took the time to reflect on their phenomenal growth and accomplishments. Many reported a continued sense of purpose going into the next phases of implementation.

WFTC will be hiring 30+ new positions over the next few months. Many of these will be promotional opportunities, and several of the current team members are expected to move into these positions.

Share a statement from someone who has been impacted by this person’s leadership: (300 word limit)

“This person’s leadership style allowed the program to unfold in the best way we could imagine—with our community as our partners, and our employees as engaged experts,” said Revenue’s Acting Director. “Their tenacity, experience, and ability to pull people together set the tone for a successful launch and implementation. Additionally, I’m confident they will guide us expertly into the next phase of legislation with the same level of compassion and enthusiasm.”

Please include two or three sentences of general personal interests/hobbies or biographical information that may be used for public purposes:

This person has been with Revenue for nearly 20 years, growing from their first position straight out of Western Washington University. They were raised in Lacey and are active in their community church as a volunteer bookkeeper and board member. They enjoy spending time with their extended family, many of whom live nearby.