



# Organization Development Initiative

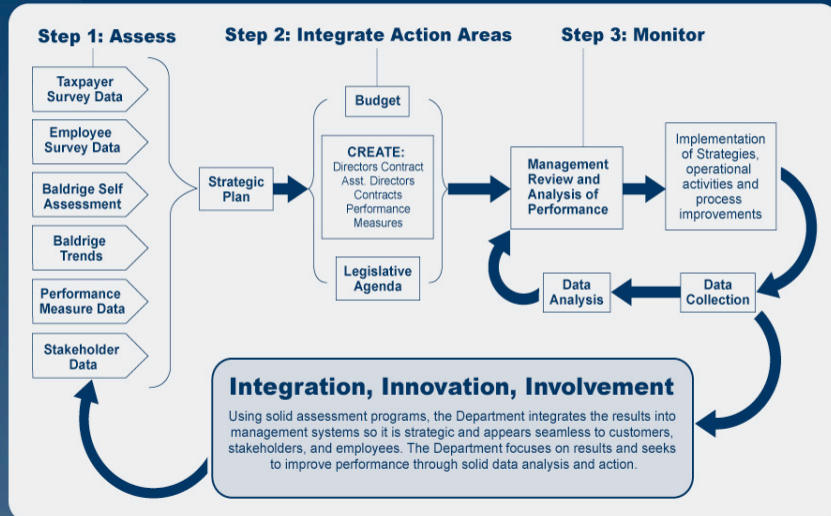
Integration, Innovation, & Involvement



## ODI Background



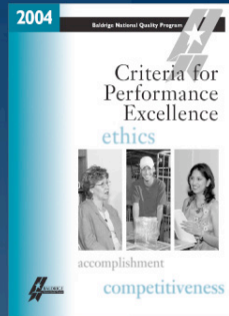
# Management Process



## Step 1: ASSESS

- Baldrige Self-Assessment
- Taxpayer Satisfaction Survey
- Employee Satisfaction Survey
- Environmental Scan for Strategic Plan
- Stakeholder Meetings

# Baldrige Self-Assessment



- Conducted every two years
- Adapt the Baldrige criteria to agency and prepare feedback reports
- Every division commits to making improvements
  - Results:
    - Every division working on performance measures
    - Half of the divisions now have a strategic plan
    - Half of divisions created or modified customer satisfaction processes
    - One third of divisions now have employee development programs that align with the agency

# Employee Survey

- Conducted every two years since late 1980's
- Agency data, divisional data December 2003 Results
  - 81% overall satisfaction rating

## 2003 Employee Satisfaction Survey Results

### CAREER DEVELOPMENT

1. I am satisfied with my employment at the Department of Revenue.

%	2003	2001	1999	1997
AGREE	81	75	81	83
DISAGREE	18	25	18	17
NO/NA	1	0	1	0

- Responses to 71 of the 88 questions showed improvement compared to 2001
- Responses to 60 of the questions reflected the highest level of satisfaction ever



# Taxpayer Survey

- Conducted every three years since early 1990's

## 2004 Taxpayer Satisfaction Survey Results

### QUESTION 14

Has your business used the Department's Electronic Filing (ELF) system?

	2004	2001
YES	47.9	10.9
NO	50.3	89.1

**Question 15:** A majority of businesses found forms (74%) and Publications (64%) to be **very or somewhat useful** services on the DOR web site.

**Question 19:** 94% of the businesses that use Electronic Filing rated it as either excellent or good.



# Environmental Scan

- Aligned with two year Agency Strategic Plan
- 2004 - What Businesses Told Us
- Increased intensity of global competition
- More involvement of vendors and partners in product and process development
- Increased use of Internet
- Cost cutting and outsourcing
- Technology changes - wireless; VoiceIP
- Shared specific Department Issues

# Stakeholder Meetings



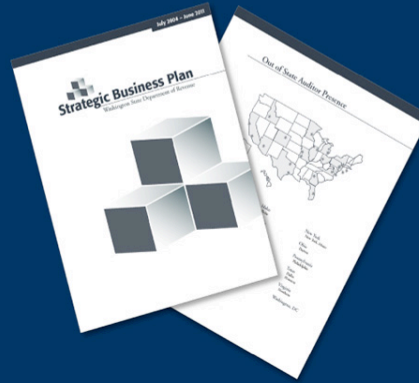
## Step 2: INTEGRATE ACTION

- Strategic Business Plan
- Budget Development
- Legislative Package
- Performance Contracts
- Service Commitments
- Performance Measurement System
- Customer Feedback Tracking
- Supervisory Academy
- Quality Improvement Expansion



# Strategic Business Plan

- 7 year plan updated every two years
- Aligned, focused, balanced
- Leads to budget development and legislative requests



# Performance Contracts

- Director performance agreement with Governor
- Strategy Team members performance agreements with Director
  - Includes: Baldrige areas, Employee and Taxpayer Satisfaction survey issues, strategic business plan projects.
  - Reported on quarterly and annually







# Service Commitments



We are committed to making your interaction with our Department professional and helpful

### YOU CAN EXPECT

- Respectful interaction with Revenue employees
- Integrity in our services and programs
- Cooperation and responsiveness to inquiries and needs
- Professional and courteous treatment
- Continuous improvement of service delivery
- Accessible and clear information

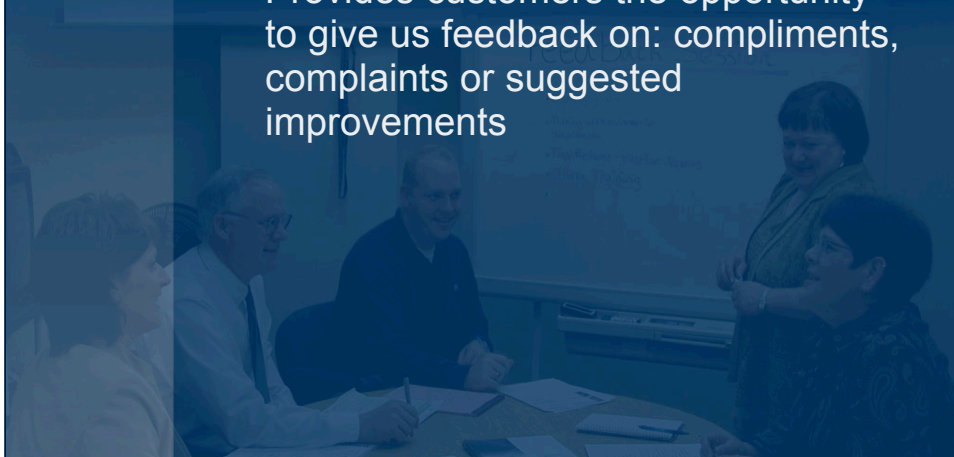
### WE WILL

- Acknowledge phone calls by next business day
- Acknowledge e-mails by next business day
- Acknowledge correspondence within 10 business days
- Greet walk-in customers in a polite and professional manner right away and indicate the approximate wait time for assistance
- Keep a current message on voice mail with the feature that the caller can press zero to speak with another staff member



# Customer Feedback Tracking

- Launched program January 1, 2004
- Provides customers the opportunity to give us feedback on: compliments, complaints or suggested improvements





## Supervisory Academy

- **Created a comprehensive program to address the needs of**
  - new first line supervisors (fresh soups)
  - seasoned first line supervisors (seasoned soups)
  - Managers (stews)
- **Includes courses, learning forums, and other suggestions for leadership development**



## Quality Improvement Expansion

- **Building capacity in the organization**
  - New classes: process management; communicating with data; facilitation; performance measures
  - Operations Team and Extended Management Team meetings
- **Quality Council Renewal**
  - Integrate planning, performance measures, quality improvement, satisfaction surveys, and other efforts among divisions



## Step 3: MONITOR RESULTS

- Performance Measures
- Performance Contracts
- Strategic Business Plan Progress
- Customer Feedback
- Quality Improvements

## Monitoring Tools

- **Performance Measures**
- **Performance Contracts**
  - Director – quarterly to Governor
  - Strategy Team – annually to Director
- **Strategic Business Plan Progress**
  - Every 6 months – check in on all progress
- **Customer Feedback**
  - Daily, monthly, annually
- **Quality Improvements**
  - Quarterly reports to Governor, agency, and quarterly recognition ceremony for teams!



# RESULTS

## STRENGTHS

- Integrated – systems and programs
- Increased Involvement of employees, managers, customers and stakeholders
- Innovative – sparks new ideas and service delivery models

## OPPORTUNITIES

- Integration across agency lines with sister agencies with similar customer bases
- Improve communication of performance internally and externally – there's never enough



# RESULTS Since January 2001

- Agency dollars saved \$641,561
- Staff (FTE) hours saved 66,404
- Revenue Generated \$26,055,202
- Savings to businesses/citizens \$2,229,560



## Intangible Results

- ODI improved divisional relationships within the Department
- Teams have a “systems view” rather than just a divisional view
- Recognition celebrations are paying off through improved morale!
  - Quarterly quality teams
  - Public Service Recognition Week surprises
  - Agency, Divisional and informal recognition programs



## Transferability

Honors agency programs while challenging them to use stronger assessments, measurement and monitoring tools, and then acting on the results!





# Want More **Information?**



**Wendy Fraser**  
Organization Development Consultant

**Washington State Department of Revenue**  
PO Box 47454  
Olympia, WA 98504-7454  
(360) 664-3209  
WendyF@dor.wa.gov