



STATE OF WASHINGTON  
**DEPARTMENT OF REVENUE**  
OFFICE OF THE DIRECTOR

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Debra Conn nomination for the 2024 Harley T. Duncan Award

It is an honor to nominate Debra Conn, Washington State Dept. of Revenue, for the 2024 Harley T. Duncan Award for Leadership and Service in State Tax Administration.

For 30 years, Debra has been immersed in tax systems, leading organizational change. Starting in 1992 as an Excise Tax Examiner, she worked her way up to Assistant Director of Revenue's Taxpayer Account Administration (TAA) division, where she oversees more than 220 employees and an annual budget of \$26 million.

As the leader of TAA, her team is responsible for a number of critical agency functions including account registration and maintenance, tax return and account examinations, and reconciliation of taxpayer account activity while also administering multiple statewide tax and incentive programs such as capital gains, forest excise, and Washington's unclaimed property program.

As a leader, Debra is known for her collaborative approach and people-centered management style. She leads with respect—truly listening to understand—to build the cohesive teams required to deploy and manage some of our department's most demanding tax programs.

She has more than once said, "I am committed to building a strong team and preparing them for the future."

#### **Capital Gains**

Long known as a state that does not tax personal income, the agency was put to the test in 2021 when the state legislature enacted an excise tax on capital gains. Debra's dedication to team-building paid dividends when tasked with implementing the capital gains excise. In this case, because the law was immediately challenged in court, her mantra of "preparing her team for the future" meant preparing them for two completely different outcomes.

Because the future of the capital gains tax was unclear and the timeline short (one year from passage to implementation), Debra's team had to prepare for a number of potential outcomes, from full implementation to repeal. Not one to rest on her laurels, Debra directed her team to create a detailed contingency plan that covered all possible scenarios. The plan included system changes, along with communication both internally and externally. Every decision that was made had to be done with two outcomes in mind. In total, more than 160 agency staff and contractors worked on the Capital Gains project, with Debra at the helm.

Running right up to the wire, the state Supreme Court ruled the tax constitutional just three weeks before the April 18, 2023 due date, allowing the processes and people in place to go full steam. Debra and the department have received national attention from this achievement, reinforcing the agency's reputation as one that accomplishes hard tasks and delivers results. As of the date of this nomination, more than 8,000 capital gains accounts have been registered, receiving over 4,200 payments in excess of \$889 million.

### **Unclaimed Property**

Another highly successful program under Debra's leadership is our Unclaimed Property (UCP) program, which found a home with TAA in 2019. Under her stewardship, the program has undergone a radical transformation with customer experience at the forefront, starting with a complete system overhaul. The new and improved website, featuring a FastTrack process for instant approval of some unclaimed property claims, made it much easier for claimants to get their money. This was a nearly \$7.3 million project that came in on time and \$2.9 million under budget.

Coupling the advances from the new system with the agency's first dedicated marketing and advertising campaign saw the program grow exponentially, in both money received and returned. In FY 2023, Revenue's UCP program returned \$138.9 million compared to \$89.4 million in 2022, an almost \$50 million increase in one year and new all-time high for the agency.

Another shining example of customer service, the Money Match Program reunites people with their cash without having to search for it themselves. The agency rolled out the program in January 2023, verifying a property owner's address with the state's database, then mailing a check straight to the owner. UCP has issued 9,104 checks for a total of \$1.2 million back to owners.

Debra's team did extensive research before rolling out the program, following best practices from other states with similar programs. UCP also used a phased approach, with an initial mailing of 2,000, allowing for a few adjustments before mailing the next batch. This thoughtful approach is just the type of leadership needed to build and maintain a thriving program.

### **Leadership and Learning**

A lifelong learner, Debra actively seeks new information, and shares with other states the lessons learned, big wins, and everything in between. Last year, she presented at the Washington State Tax Conference on staffing challenges and solutions and regularly presents to business and industry partners around the state. Always ahead in systems technology, Debra presented at multiple Federation of Tax Administrators technology conferences early in her career. She was also selected to help stand up the Streamlined Sales Tax Governing Board which implemented the Streamlined Sales Tax program nationally.

Debra continues to use sound judgement and collaboration, building on a successful career in tax account administration. In 2018, Debra was selected as the business sponsor for the second phase of a \$90 million project to replace the state's aging tax and licensing systems. That was the right selection, as Debra ushered the largest of three phases into a seamless transition for taxpayers. She subsequently won a Governor's Leadership in Management award.

It is worth a repeat: Debra's contributions have significantly and positively shaped the way we serve our customers. Her leadership continues to be an inspiration and it is a privilege to nominate Debra Conn for the celebrated Harley T. Duncan award. Thank you for your consideration.

Sincerely,



Drew Shirk  
Washington State Dept. of Revenue