

Diversity, Opportunity, and Inclusion

2025 Annual Report

Department of the Treasury

2025

2025 ACCOMPLISHMENTS

Plan Goal 1: Access & Success

The Department of the Treasury continued its commitment to improving public access to information and services through technology enhancements and expanded outreach efforts.

- Updated the Treasury website to comply with HB521 accessibility requirements, improving access to information for all Virginians.
- Enhanced the Unclaimed Property program's online capabilities, allowing citizens to file claims electronically.
- Five public access terminals are installed in libraries throughout the Commonwealth, expanding access to Treasury services for individuals who may not have reliable internet access.
- Continued efforts to improve the quality, accessibility, and availability of public information through digital communications and website enhancements.

Plan Goal 2: Welcoming & Respectful Culture

Treasury continued modernization efforts that support an inclusive, efficient, and collaborative workplace environment.

- Conducted ongoing assessments of agency processes and workflows to identify opportunities for increased efficiency and improved service delivery.
- Advanced modernization initiatives across agency divisions to support long-term operational success.
- Continued implementation of technology solutions that improve accessibility, efficiency, and customer service.
- Developed agency guidance regarding the responsible use of Artificial Intelligence (AI) technologies to support innovation while maintaining accountability, security, and compliance.
- Maintained a culture of transparency and accountability by communicating progress on modernization initiatives and encouraging employee participation in process improvement efforts.

Plan Goal 3: State Agency DOI Infrastructure & Training

Treasury strengthened its infrastructure for document management, knowledge sharing, and organizational consistency.

- Formed a cross-divisional committee to review current document management practices and identify opportunities for improvement.
- Evaluated existing processes related to document creation, maintenance, retention, and accessibility.
- Continued efforts to standardize documentation practices across divisions.
- Supported employee engagement and collaboration through committee participation and process improvement initiatives.
- Advanced planning for long-term document management solutions that will improve productivity, consistency, and knowledge retention across the agency.

2026 AGENCY DOI GOALS

- Agency Goal 1: Continued focus on enhancements to Treasury's website and better use of social media platforms, the public will have access to information to better understand Treasury's performance of its duties.
- Agency Goal 2: Continue to modernize and improve each division's processes to ensure long-term success as a trusted steward for the Commonwealth.
- Agency Goal 3: Continuously enhance the productivity and efficiency of agency resources. Treasury will provide a structured process for creating, maintaining, and retaining agency documents used across the agency.

July 1, 2026

Diversity, Opportunity, and Inclusion Plan

PURPOSE

As a steward of the Commonwealth's financial resources, the Department of the Treasury's mission is to ensure excellence in managing its banking, investing and financing services, and the administration of unclaimed property and insurance programs.

Treasury is committed to inclusive excellence and providing all employees and applicants an environment of mutual respect that is free from discrimination and harassment of any kind. We ensure that no applicant for employment or employee is denied equal opportunity because of race, color, religion, sex, gender identity, sexual orientation, pregnancy, status as a parent, national origin, age, disability (physical or mental), family medical history or genetic information, political affiliation, military service, or other non-merit-based factors.

This Plan envisions that Treasury's leadership, in partnership with the Employee Engagement Committee, will assume responsibility for its implementation. Treasury's leaders recognize that promoting diversity, enhancing inclusive behavior, and advancing opportunities are both individual and collective responsibilities. These principles must be prominent in the agency's fabric and culture.

TREASURY'S EMPLOYEE ENGAGEMENT COMMITTEE (EEC)

There is strong support for the conclusion that diversity in leadership and the workforce is essential for maximizing mission effectiveness and impact. In creating a culture of inclusion, we understand that it isn't just the right thing to do; it's also the smart thing. Diverse agencies are more innovative and better positioned to succeed.

The Department of the Treasury will continue to utilize a committee of employees to ensure the Virginia Department of the Treasury fosters an environment that promotes diversity, opportunity (DOI), and inclusion among the staff. The committee will provide feedback and recommendations on the strategic goals listed in this plan, develop strategies and best practices, and recommend changes as needed. The Treasury EEC committee will meet every month to discuss ideas, challenges, policies, and EEC goals.

We strive to create workplaces that reflect our communities and empower everyone to bring their whole, authentic selves to work. There is progress to be made, but we are dedicated to our people, customers, and community to achieve the goals outlined in this plan.

STRATEGIC GOALS

Goal 1: Through focused enhancements to the Treasury's website and better use of social media platforms, the public will have access to information to better understand the Treasury's performance of its duties.

Objective 1: Revamp the Human Resources tab on the Treasury's website to make information more accessible, create a dedicated section for DOI-related information, and ensure the website is mobile-friendly.

Objective 2: Enhance content quality by including multimedia content such as videos, infographics, and interactive charts. Timely updates and announcements regarding the Treasury's activities, initiatives, and achievements will also be published.

Objective 3: Encourage feedback and transparency by providing avenues for the public to submit feedback, suggestions, or inquiries. The Treasury will also commit to transparency by regularly publishing reports, data, and performance metrics.

Goal 2 – Modernize and improve each division's processes to ensure long-term success as a trusted steward for the Commonwealth.

Objective 1: Conduct a thorough assessment of processes, systems, and workflows within each division to identify inefficiencies, bottlenecks, and areas for improvement. Gather input from diverse stakeholders, including divisional leaders and employees, to understand their pain points and challenges.

Objective 2: Define objectives and goals for modernization and process improvement initiatives aligned with the Treasury's mission and strategic priorities. Prioritize initiatives based on their potential impact on efficiency, effectiveness, and customer service.

Objective 3: Identify opportunities to leverage technology solutions such as automation, digital platforms, and data analytics to streamline processes and enhance productivity. Invest in modern tools and systems to replace outdated or manual processes, ensuring compatibility and integration with existing systems as well as accessibility and inclusion for all employees and stakeholders.

Objective 4: Establish standardized procedures, guidelines, and best practices for key processes across divisions to promote consistency, efficiency, and quality. Provide training, development opportunities, and resources to employees to ensure adherence to standard procedures while supporting professional growth and organizational effectiveness.

Objective 5: Ensure compliance with regulatory requirements, data security standards, and risk management protocols throughout modernization. Implement controls and safeguards to mitigate process changes and technology adoption risks.

Objective 6: Foster a culture of transparency and accountability by regularly communicating progress, achievements, and challenges related to modernization efforts. Establish oversight, governance, and accountability mechanisms to ensure responsible resource use and alignment with strategic goals.

Goal 3: To enhance the productivity and efficiency of agency resources, Treasury will provide a structured process for creating, maintaining, and retaining documents used across the agency.

Objective 1: Establish standardized guidelines and procedures for creating, maintaining, and retaining agency documents. Define document types, naming conventions, file formats, version control, and approval workflows. Incorporate perspectives from diverse stakeholders to ensure compliance with relevant regulations, policies, and best practices for document management.

Objective 2: Select and implement a suitable Document Management System (DMS) to facilitate document creation, storage, retrieval, and collaboration. Train employees on using the DMS effectively and adhering to document management guidelines. Customize the DMS to meet the specific needs and workflows of different departments within the Treasury.

Objective 3: Integrate the DMS with existing systems and software applications used by the Treasury to streamline document management processes. Ensure seamless integration with email, collaboration tools, and other business applications to enhance productivity and efficiency.

Objective 4: Promote awareness and encourage the adoption of the new document management process among employees through training sessions, workshops, and communication campaigns. Provide ongoing support and resources to help employees transition to the new system and embrace best practices for document management.

Objective 5: Solicit employee and stakeholder feedback to identify improvement areas and enhance the document management process. Implement continuous improvement initiatives to optimize document management practices and maximize productivity and efficiency.

Objective 6: To safeguard sensitive information and ensure compliance with data privacy regulations and security standards. Implement access controls, encryption, and audit trails to protect documents from unauthorized access, tampering, or loss.

By pursuing these goals and objectives through a diversity, opportunity, inclusion, engagement, and continuous improvement lens, Treasury will continue fostering a workplace culture that values belonging, innovation, accountability, and excellence. These efforts will strengthen Treasury's ability to serve its employees, stakeholders, and the citizens of the Commonwealth while advancing its mission as a trusted steward of Virginia's financial resources.