

Department: County Management

Program Contact: Gary Bartholomew

Program Offer Type: Existing Operating Program

Program Offer Stage: As Requested

Related Programs:
Program Characteristics: In Target

Executive Summary

The Division of Assessment, Recording, and Taxation (DART) Customer Service Program is the first primary point of contact for DART customers at the public counter, through the organization's incoming phone system, by email and via online chat.

Program Summary

The Customer Service program responds to approximately 90,000 inquiries and 40,000 walk-in customers annually (which includes approximately 28,000 reported in the County Clerk Function Program Offer). Staff process tax payments, sell copies of records and provide general information on behalf of the organization. Property owners, taxpayers and citizens in general have an expectation of local government to provide responsive, accurate, and quality service. The ability to connect directly with the taxpayer increases the understanding of government and the role of property taxation.

Staff spend several hours each year training with other sections throughout the organization, as well as gaining knowledge by reading a variety of relevant informational materials. Customer Service staff also assist the Tax Revenue Management Program by processing approximately 11,000 over-the-counter tax payments totaling approximately \$50 million dollars annually. This year the passport photo and County photo ID processes were transferred under supervision of DART Customer Service and relocated to the DART offices. The operational costs continue to be split between DART and Facilities & Property Management. DART took 4,817 passport photos during FY 2015, resulting in revenue of \$48,370. Other recent efficiency and service improvements included point of sale debit/credit cards and website enhancements. Further improvements are expected from a new assessment and taxation system scheduled for June 2017.

Performance Measures

Measure Type	Primary Measure	FY15 Actual	FY16 Purchased	FY16 Estimate	FY17 Offer
Output	Number of counter transactions	54,847	41,000	50,000	55,000
Outcome	Average number of transactions per cashier	5,485	4,100	5,000	5,500
Output	Number of phone calls received and answered	62,000	75,000	65,000	65,000
Outcome	Average number of phone calls per operator	5,905	7,000	6,200	6,200

Performance Measures Descriptions

"Number of counter transactions" includes both computer-generated statistics from the operating systems used in Customer Service and statistics from staff production reports. The system tracks revenue generating transactions including tax payments, marriage licenses, Domestic Partnership Registrations, passport applications and copies of various records. Staff production reports track routine, non-payment transactions. An additional 10% was added to the production report statistics for transactions that may not have been tracked.

Legal / Contractual Obligation

Oregon Revised Statutes(ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310, 311, 312 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property taxation process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Department of Revenue (DOR). Through the "County Assessment Function Funding Assistance" (CAFFA) Grant process described in ORS 294.175, the DOR determines the acceptable level of assessment and taxation staffing. The DOR has determined that DART staffing is at the minimally acceptable level to perform their functions. Any reduction to this program may jeopardize this grant revenue.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2016	2016	2017	2017
Personnel	\$757,697	\$0	\$799,818	\$0
Materials & Supplies	\$16,162	\$0	\$16,305	\$0
Internal Services	\$231,906	\$0	\$253,935	\$0
Total GF/non-GF	\$1,005,765	\$0	\$1,070,058	\$0
Program Total:	\$1,005,765		\$1,070,058	
Program FTE	9.30	0.00	9.40	0.00

Program Revenues				
Intergovernmental	\$272,644	\$0	\$272,212	\$0
Total Revenue	\$272,644	\$0	\$272,212	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 25% of Assessment & Taxation program expenditures. Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,624,656 for FY 2017, with \$272,212 allocated to DART Customer Service Program. Remaining Customer Service Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2016: 72024-16 DART Customer Service

Allocated .10 FTE Deputy County Assessor position to Customer Service program for FY 2017.