

**Department:** County Management

**Program Contact:** Tim Mercer

**Program Offer Type:** Existing Operating Program

**Program Offer Stage:** As Proposed

**Related Programs:**
**Program Characteristics:**
**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 140,000 inquiries annually, including 60,000 walk-in customers and approximately 28,000 reported in the County Clerk Function Program Offer. Staff process tax payments, sell copies of records, process passport applications, 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 spends 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. Passport photo and County photo ID processes were transferred under the supervision of DART Customer Service and relocated to the DART offices in 2014. The operational costs are split between DART and Facilities & Property Management for photo services. Other recent efficiency and service improvements included point of sale debit/credit cards and website enhancements. In FY19 DART completed installation of new enterprise software (Orion), which is used in all of DART business processes.

**Performance Measures**

Measure Type	Primary Measure	FY18 Actual	FY19 Purchased	FY19 Estimate	FY20 Offer
Output	Number of counter transactions	60,661	57,500	56,423	57,500
Outcome	Average number of transactions per cashier	6,558	5,750	6,100	6,216
Output	Number of phone calls, emails and chats received and answered	72,856	70,000	76,339	76,339
Outcome	Average number of phone calls per operator <sup>8253</sup>	7,876	7,000	8,253	8,252

**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.

## 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	2019	2019	2020	2020
Personnel	\$774,606	\$0	\$891,910	\$0
Contractual Services	\$0	\$0	\$2,650	\$0
Materials & Supplies	\$17,124	\$0	\$20,110	\$0
Internal Services	\$431,560	\$0	\$374,256	\$0
<b>Total GF/non-GF</b>	<b>\$1,223,290</b>	<b>\$0</b>	<b>\$1,288,926</b>	<b>\$0</b>
<b>Program Total:</b>	<b>\$1,223,290</b>		<b>\$1,288,926</b>	
<b>Program FTE</b>	9.10	0.00	9.50	0.00

Program Revenues				
Intergovernmental	\$287,516	\$0	\$278,562	\$0
<b>Total Revenue</b>	<b>\$287,516</b>	<b>\$0</b>	<b>\$278,562</b>	<b>\$0</b>

## Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 21% 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 \$3,627,108, with \$278,562 allocated to DART Customer Service. Remaining Customer Service Program support is provided by General Fund revenues.

## Significant Program Changes

**Last Year this program was:** FY 2019: 72024-19 DART Customer Service

Increased DART Customer Service staffing from 9.10 FTE to 9.50 FTE. Moved .10 FTE allocation of Deputy County Assessor position to DART Admin Program 72023; A Program Supervisor position (705139) formerly in DART Special Programs 72030 was reclassified to Program Mgr 1 and .50 FTE was allocated to Customer Service Program. Net Increase 0.40 FTE.