

**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. The Customer Service professionals assist the community by providing virtual and in person assistance with questions regarding and the acceptance of property tax payments, marriage licenses and domestic partnerships, passport services including passport photos, employee IDs, and administer the Board of Property Tax Appeals. This excellent service is provided through the organization's soft phone system, at the public counter, through mail, by email, and via online chat.

### Program Summary

The Customer Service unit is responsible for assisting taxpayers in person, over the phone, and through chat and email; the issuance and record keeping of marriage licenses and domestic partnerships which are governed by state law; administering the passport acceptance program that is administered by federal laws and regulations; accepting property tax payments that are guided by state statutes; and administering the Board of Property Tax Appeals program that is guided by state statutes. The Employee Photo unit is responsible for the issuance of county employee photo IDs and processing passport application photos. During FY20, the Customer Service program responded to approximately 110,000 inquiries, including 40,000 walk-in customers. 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. COVID-19 has necessitated the need for the team to telework. The transition to telework went smoothly, but challenges existed at the beginning due to the phone system. This was alleviated by upgrading to a soft phone system that allows all team members to answer customer calls from multiple locations. COVID-19 has provided a host of challenges for the team as they assist community members who are experiencing financial or other difficulties due to the pandemic. An office presence is essential for duties that cannot be accomplished remotely. Since in person service is currently closed, a process had to be created for processing marriage licenses and domestic partnerships in order to accommodate this service. The new process achieves our goal, but additional steps add to the workload and processing time. Work continues to further automate this process in order to serve the community in a more efficient manner going forward. The acceptance and processing of passports and passport photos have ceased since the Multnomah building has been closed to the public. Employee photo ID service continues to function on an appointment basis. The clerk functions of the Board of Property Tax Appeals program have been reimaged to an online format, but a need for in-office processing of certain appeals functions still exists. Teleworking will continue for a percentage of the team who will be responsible for answering incoming calls, chats, and emails. In person services will recommence when it is safe to do so with the understanding that our services may look different going forward, but will continue to focus on providing equitable, excellent service.

### Performance Measures

Measure Type	Primary Measure	FY20 Actual	FY21 Budgeted	FY21 Estimate	FY22 Offer
Output	Number of counter transactions	41,576	57,500	13,000	50,000
Outcome	Average number of transactions per cashier	4,495	6,230	1,405	5,405
Output	Number of phone calls, emails, and chats received and answered	74,057	79,000	104,000	70,000
Outcome	Average number of phone calls, emails, and chats per operator	7,406	8,500	11,243	7,567

### Performance Measures Descriptions

"Number of counter transactions" includes computer-generated statistics from the operating systems used in Customer Service. The system tracks revenue-generating transactions including tax payments, marriage licenses, domestic partnership registrations, passport applications and copies of various records. The FY21 estimate for counter transactions is well under the planned number due to the building being closed for the majority of the fiscal year. The FY22 number for counter transactions presumes that the building will be open to the public for much of the fiscal year.

## 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

	Adopted General Fund	Adopted Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2021	2021	2022	2022
Personnel	\$1,098,201	\$0	\$1,218,168	\$0
Contractual Services	\$2,650	\$0	\$2,650	\$0
Materials & Supplies	\$20,875	\$0	\$19,875	\$0
Internal Services	\$368,545	\$0	\$354,684	\$0
<b>Total GF/non-GF</b>	<b>\$1,490,271</b>	<b>\$0</b>	<b>\$1,595,377</b>	<b>\$0</b>
<b>Program Total:</b>	<b>\$1,490,271</b>		<b>\$1,595,377</b>	
<b>Program FTE</b>	11.00	0.00	11.45	0.00

Program Revenues				
Intergovernmental	\$235,937	\$0	\$274,580	\$0
<b>Total Revenue</b>	<b>\$235,937</b>	<b>\$0</b>	<b>\$274,580</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 15% 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 \$3,004,161, with \$274,580 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

An increase of .45 FTE is due to reallocation and realignment of staffing between DART Customer Service Program (72024) and DART County Clerk Functions (72025A).