

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 DART Ownership Program is responsible for making real property ownership changes and adding sale information, when applicable, to the tax roll. Through examination of recorded and unrecorded documents, this program verifies the documentation and ensures that the documentation is acceptable for ownership transfers to take place. The Ownership Program maintains a transaction file for complex transfers, which is maintained for permanent retention on microfilm. Program staff interact with the public and internal staff, both on the phones and at the public counter.

Program Summary

The Ownership Program, within the Division of Assessment Recording and Taxation (DART), updates and maintains the ownership and property description for the majority of real property tax accounts. Recorded documents, such as deeds, contracts and assignments, are the most common instruments used to update the tax roll with correct names and mailing addresses. Additionally, unrecorded documentation is often used for name changes to the tax roll. This documentation includes marriage records, court orders, and death certificates. Accurate ownership information is essential to other DART programs in ensuring that various notices and tax statements are sent to the correct party. This information is also used for the production of county maps. Property sales are utilized by the Valuation Section in the process of updating property values. The Ownership Program monitors certain types of accounts for notification to other areas throughout the organization. Developed databases enable related work units to access shared data, thereby reducing transfer time and the need for paper records. A new assessment and taxation system scheduled to go live June 2017 is expected to further increase efficiencies.

Performance Measures

Measure Type	Primary Measure	FY15 Actual	FY16 Purchased	FY16 Estimate	FY17 Offer
Output	Number of Ownership Changes Processed	27,552	27,000	31,000	30,000
Outcome	Average Number of Days to Complete Ownership Changes	3	3	3	3

Performance Measures Descriptions

The "Number of Ownership Changes Processed" is a combination of ownership changes processed from actual recorded deeds and ownership changes transferred with unrecorded documents (approximately 5% of transfers are from unrecorded documentation). The "Average Number of Days to Complete Ownership Changes" is tracked manually by staff by logging both the date the work is begun and the date of completion. Those numbers are then combined and divided by the actual number of working days in the fiscal year.

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 92, 93, 199, 205,222,308,457, 477, and 478. Additionally, 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 (A&T) staffing. The DOR has determined that DART staffing is already at the minimally acceptable level to perform their A&T 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	\$343,064	\$0	\$364,045	\$0
Contractual Services	\$1,474	\$0	\$1,474	\$0
Materials & Supplies	\$2,658	\$0	\$1,750	\$0
Internal Services	\$77,379	\$0	\$87,484	\$0
Total GF/non-GF	\$424,575	\$0	\$454,753	\$0
Program Total:	\$424,575		\$454,753	
Program FTE	4.20	0.00	4.20	0.00

Program Revenues				
Intergovernmental	\$123,062	\$0	\$121,788	\$0
Total Revenue	\$123,062	\$0	\$121,788	\$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 \$121,788 allocated to DART Ownership Program. Remaining Ownership Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2016: 72026-16 DART Ownership