



**Program #72035A - DART Assessment & Taxation System Upgrade** 2/24/2014

**Department:** County Management **Program Contact:** June Tilgner  
**Program Offer Type:** Existing Operating Program **Program Offer Stage:** As Requested  
**Related Programs:**  
**Program Characteristics:** In Target

**Executive Summary**

This multi-year system upgrade project was initially approved in the FY 2008 Budget. The Division of Assessment, Recording and Taxation is replacing the outdated Assessment and Taxation system. A request for proposal was published in FY 2008. In FY 2009 were vendor proposal evaluations and selection, with a contract approved at the end of FY 2009. Many milestones were met through FY 2010, FY 2011 and FY 2012. The contract was cancelled in FY 2013 due to missed milestones. In FY 2014 BCC approved new vendor Tyler Technologies under Sole Source Rule 47-0288(1).

**Program Summary**

The Division of Assessment, Recording and Taxation (DART) is seeking a system upgrade that features integration among all DART business functions, including GIS, document recording, real property assessment, business personal property assessment, tax collection and tax distribution. The program mission is to improve property assessment and taxation services to the customers and stakeholders of Multnomah County by replacing existing legacy software with current technology that will include, and enhance, integration with other applications. The new software application will substantially reduce systemic gaps and duplication of data that exists in our current environment. The technology will increase staff efficiency and the ability to accommodate an increasing workload, playing a key role in e-government for Multnomah County, and employ an IT architecture that considers integration with County standard infrastructure. The program goals and objectives are: 1) Acquire and implement available information technology, replacing the current Assessment and Taxation computer application, to achieve greater operation efficiency and revenue enhancement while maintaining or improving accuracy and compliance for A& T business functions; 2) Reduce costs of targeted operations so that human resources can be more productively used; 3) Improve public visibility, accessibility, and convenience of assessment, taxation and recording services via web-based electronic and online resources, while maintaining appropriate control over publicly sensitive personal information.

**Performance Measures**

Measure Type	Primary Measure	FY13 Actual	FY14 Purchased	FY14 Estimate	FY15 Offer
Output	Number of A&T System Project Milestones Met	0	8	1	0
Outcome	% of A&T Project Milestones Completed on Time and within Budget	0	100%	100%	0

**Performance Measures Descriptions**

The multi-year project to select and implement a new A&T System has met the following milestones: FY08- Publish RFP; FY09-Eval. Proposals, Select Vendor, Negotiate Contract; FY10-GAP Analysis Start, Design Start, Dev.Start (a), Server/Oracle Installed; FY11-GAP Analysis Finish, Design Finish, Dev.Start (b), Data Migration Start, Integrations Start. In FY13-Vendor contract cancelled. FY14-BCC approved new vendor Tyler Technologies under Sole Source Rule 47-0288 (1). FY14 milestone: Negotiate Contract. FY15 Milestones TBD as part of contract negotiations.

## Legal / Contractual Obligation

TBD Contract negotiations in process

## Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2014	2014	2015	2015
Personnel	\$0	\$239,140	\$0	\$311,091
Contractual Services	\$0	\$1,624,116	\$0	\$1,900,000
Materials & Supplies	\$0	\$1,578,619	\$0	\$1,588,909
Capital Outlay	\$0	\$0	\$0	\$100,000
<b>Total GF/non-GF</b>	<b>\$0</b>	<b>\$3,441,875</b>	<b>\$0</b>	<b>\$3,900,000</b>
<b>Program Total:</b>	<b>\$3,441,875</b>		<b>\$3,900,000</b>	
<b>Program FTE</b>	0.00	0.00	0.00	0.00

Program Revenues				
Beginning Working Capital	\$0	\$3,441,875	\$0	\$3,900,000
<b>Total Revenue</b>	<b>\$0</b>	<b>\$3,441,875</b>	<b>\$0</b>	<b>\$3,900,000</b>

## Explanation of Revenues

BWC represents estimated carryover of unspent Fund 2504 project fund balance, and is based upon BWC in FY14, less estimated project expenditures during FY14.

## Significant Program Changes

Last Year this program was: 72035 DART Assessment & Taxation System Upgrade