

### Program #78326 - DART Orion Assessment & Taxation Project

3/4/2020

**Department:** County Assets **Program Contact:** Tracey Massey

Program Offer Type: Existing Operating Program Program Offer Stage: As Requested

**Related Programs:** 

Program Characteristics: In Target

## **Executive Summary**

In FY 2014, the Board of County Commissioners approved a Sole Source Exemption for vendor Tyler Technologies under Sole Source Rule 47-0288(1). In June 2014, Multnomah County executed a multi-year contract to provide the County with Tyler Technologies' Orion CAMA/Tax Standard software system, support, and professional services required to customize, enhance and implement the system. The system is rolling out in phases from FY19 through FY21.

### **Program Summary**

The Division of Assessment, Recording and Taxation (DART) implemented a new system that features integration among all DART functions including GIS, Recording, real and business personal property assessment, tax collection and distribution. The program mission is to improve assessment and taxation services to the customers of Multnomah County by replacing legacy software with current technology, enhancing integration with other applications. The new application reduces systemic gaps and duplication of data existing in our current environment. It increased staff efficiency and the ability to accommodate an increasing workload, playing a key role in e-government for Multnomah County, employing an IT architecture that considers integration with County standard infrastructure. The program goals and objectives are: 1) Acquire and implement available information technology, replace the current Assessment and Taxation computer application, achieve greater efficiency while maintaining or improving accuracy and compliance for A&T business functions; 2) Reduce costs of operations so resources can be more productively used; 3) Improve public 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.

In FY21, the remaining project deliverables are to be completed and paid including: Tax Collection End-to-End Application Testing, UAT Development Support, Acceptance Support, Final Acceptance and Retainage Payment.

Performance Measures								
Measure Type	Primary Measure	FY19 Actual	FY20 Budgeted	FY20 Estimate	FY21 Offer			
Output	Number of A&T System Project Milestones Met	13	15	18	1			
Outcome	System is fully functional, end to end.	N/A	N/A	N/A	100%			

#### **Performance Measures Descriptions**

## **Revenue/Expense Detail**

	Adopted General Fund	Adopted Other Funds	Requested General Fund	Requested Other Funds
Program Expenses	2020	2020	2021	2021
Contractual Services	\$0	\$1,386,360	\$0	\$935,000
Total GF/non-GF	\$0	\$1,386,360	\$0	\$935,000
Program Total:	\$1,386,360		\$935,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues								
Financing Sources	\$0	\$0	\$0	\$935,000				
Beginning Working Capital	\$0	\$1,386,360	\$0	\$0				
Total Revenue	\$0	\$1,386,360	\$0	\$935,000				

## **Explanation of Revenues**

Cash Transfer In for FY 2021 represents the estimated carryover of unspent Fund 2504 project fund balance, after projected FY 2020 expenditures.

# **Significant Program Changes**

Last Year this program was: FY 2020: 72035-20 DART Assessment & Taxation System Upgrade

The project has moved from Program Offer 72035, Fund 2504 to Program Offer 78326, Fund 3503 in FY21.