

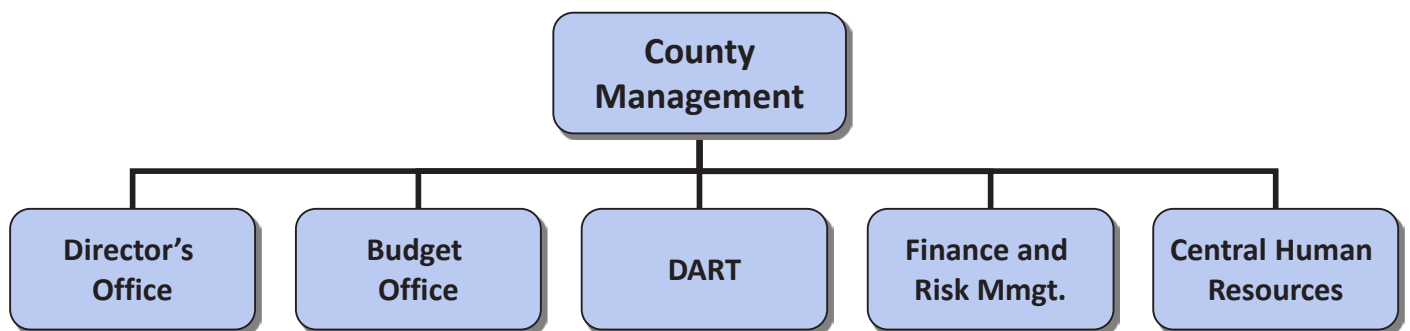
Department Overview

The department hires and trains the county’s workforce, pays the County’s bills and safeguards the County’s funds. The divisions of Finance and Risk Management, Central Human Resources and the Central Budget Office work with the Chair and across County departments under the supervision of the Chief Operating Officer (COO) to set countywide corporate policies aimed at protecting County assets, reducing financial risk and preserving the ability of the County to serve the community. The Division of Assessment, Recording and Taxation maintains property records and assessments and collects property taxes, the primary source of General Fund revenue.

DCM provides administrative services and guidance to all County departments. DCM also supports the Chair, Commissioners and other elected officials with high-level forecasts and policy analysis. The COO, the Chief Financial Officer (CFO), the Budget Director and the Chief Human Resources Officer (CHRO) work closely with the Chair, County Attorney and Chief Information Officer (CIO) to ensure strong and consistent management of day-to-day county operations.

DCM faces a number of opportunities and challenges in the coming year. After several years of stability, the department finds itself at the center of enterprise-wide change.

Organizational transformation efforts such as the configuration and implementation of the County’s new enterprise resource planning (ERP) software suite, which will replace SAP with Workday for our Finance and Human Resources information; concerted efforts to improve the experience of employees of color; and a re-established mandate to dismantle structural racism in Multnomah County’s hiring cycle are all testing the technical and human capacity of DCM’s corporate divisions.



Budget Overview

The FY 2019 Department of County Management’s (DCM) adopted budget is \$165 million, an increase of \$9.3 million from the FY 2018 Adopted Budget. The FY 2019 budget is comprised of 25% General Fund and 75% Other Funds.

Personnel Services have increased by \$2.9 million (9.0%) due to the addition of 6.40 FTE, COLA and step adjustments. The budget is adding 6.00 FTE for the DCM Workday Management Team (72022). Contractual Services have decreased by \$1.9 million. The main reasons for the reduction are \$1.8 million in DART Assessment & Taxation System (72035) and Tax Title (72038). The largest category of expenditures in all funds is in materials and supplies at \$115.8 million. This is mostly budgeted in the Risk Fund for medical and dental insurance costs. Risk Fund expenditures in this category have increased by \$8.7 million. There was a one-time-only Capital Outlay of \$1.2 million in FY 2018 in the A Home for Everyone Capital Investments program (72041).

The following programs are funded on a one-time-only basis:

- Organizational Development (72000B) \$284,998
- DART Residential Development Program (72036) \$760,225
- DCM Workday Management Team (72022) \$1,152,068
- DART County Clerk Carryover (72025B) \$150,000
- Mental Health System Analysis Follow-up (72042) \$100,000
- FRM Purchasing (72005) \$25,000

In addition, \$500,000 has been added for the Workforce Strategic Equity Plan (72000C); half is one-time-only funds and half will be ongoing. A new Construction Diversity and Equity program (72044), with revenues from a portion of new construction or renovation with a budget of \$100,000 is funded on an ongoing basis.

Budget Trends	FY 2017	FY 2018	FY 2018	FY 2019	Difference
	Actual	Current	Adopted	Adopted	
		Estimate	Budget	Budget	
Staffing FTE	252.87	256.35	256.35	262.75	6.40
Personnel Services	\$28,758,156	\$31,446,168	\$32,652,720	\$35,600,618	\$2,947,898
Contractual Services	9,496,684	5,940,900	9,286,121	7,416,308	(1,869,813)
Materials & Supplies	100,466,274	104,118,686	106,973,843	115,803,736	8,829,893
Internal Services	6,874,717	6,266,987	5,662,076	6,211,664	549,588
Debt Service	70,000	0	0	0	0
Capital Outlay	<u>1,114,425</u>	<u>0</u>	<u>1,175,000</u>	<u>0</u>	<u>(1,175,000)</u>
Total Costs	\$146,780,255	\$147,772,742	\$155,749,760	\$165,032,326	\$9,282,566

*Does not include cash transfers, contingencies or unappropriated balances.

Successes and Challenges

Budget Office

- The County received the Government Finance Officers Association's Distinguished Budget Presentation Award for the FY 2018 budget.
- 92% of respondents to the annual budget survey rated the Budget Office as "good" or "excellent."

Central Human Resources

- Supporting the work of Multco Align Human Capital Management Workday team is both a success and ongoing challenge for the division.
- Continued implementation of the HR Strategic Plan which guides the division's work through FY 2020.
- The Research and Evaluation Unit published two large-scale studies of employee experience: the Workforce Trends Report and the 2017 Countywide Employee Survey.
- Ratified new contracts with AFSCME Local 88 and the Corrections Deputies Association (MCCDA).

The Division of Assessment, Recording & Taxation (DART)

- After three years of development, DART went live with the appraisal portion of their new assessment and taxation software program, ORION, in February 2018.
- DART is now focused on the June 2018 go-live date for the tax and collection portion of ORION in preparation for the 2018 tax roll.
- DART continues to experience year-over-year increases in demands on its Customer Service program.

Finance and Risk Management (FRM)

- S&P Global Ratings and Moody's Investor Service gave the County the highest possible rating for its long-term credit, citing our strong budget management, low debt, moderate pension burden, adequate reserves and growing tax base.
- Received the GFOA Award for Distinguished Financial Reporting for the CAFR (year ended June 30, 2016) for the 33rd consecutive year
- \$164.1 million of Full Faith & Credit obligations were sold in December 2017. Proceeds financed construction of the new Courthouse, Health Department Headquarters, implementation of the new ERP system, and renovations to the DCJ East Campus facilities.
- One of the biggest challenges facing FRM is how the ERP will impact staffing and daily operations. There will be new responsibilities and workloads after the ERP goes live.
- Recruiting applicants with advanced government accounting and financial reporting skills is another challenge. The current salary structure has been outpaced by other governments and the private sector. Smaller applicant pools and difficulty hiring are impacting turnover and productivity.

Diversity and Equity

DCM believes that a strong and healthy county begins with an equitable and diverse workforce and community. The following internal and external efforts help ensure a more inclusive and equitable work environment:

- DCM is supporting the countywide efforts on Workforce Equity.
- The COO is leading a project, with the help of a human resources consulting firm, Central and department human resource teams, and the Office of Diversity and Equity (ODE), to review and analyze County policies and practices and identify where existing policies and practices may support institutional racism or create unjust barriers for employees in protected classes. The firm will produce a comprehensive report and detailed recommendations.
- The Director’s Office developed an interim process for intake and investigation of protected class complaints.
- The Central HR Strategic Plan includes focused efforts on inclusion and equity.
- The Equity Lens is being applied to work on the Multco Align program.
- DART participates in the College to County mentorship program.
- The Evaluation and Research Unit (ERU) has several projects that support countywide equity work, including:
 - Analysis of Countywide Employee Survey of employee experience, with a focus on equity, will be issued in April 2018;
 - Analysis of significant HR trends (hires, separations, promotions, etc.), including analysis of difference across demographics;
 - A qualitative analysis of the experiences and needs of employees with disabilities will be released in Spring 2018 in partnership with ODE; and,
 - The ERU-sponsored Community of Practice for Evaluation and Research is hosting regular events on equity and research/evaluation and the county.

Budget by Division

Division Name	FY 2019 General Fund	Other Funds	Total Division Cost	Total FTE
DCM Director's Office	\$2,771,561	\$0	\$2,771,561	12.50
Budget Office	2,530,972	0	2,530,972	13.00
Finance and Risk Management	9,382,990	7,978,433	17,361,423	62.00
Central Human Resources	4,463,343	114,368,246	118,831,589	40.75
Division of Assessment, Recording & Taxation (DART)	<u>21,493,513</u>	<u>2,043,268</u>	<u>23,536,781</u>	<u>134.50</u>
Total County Management	\$40,642,379	\$124,389,947	\$165,032,326	262.75

Director's Office

The Division is home to the County's Chief Operating Officer (COO), who also serves as the DCM Department Director, and the Business Services and Capital Assets Strategic Planning programs.

The COO is responsible for the administrative infrastructure and financial health of the County. The COO provides strategic direction for county-wide projects and ensures that complex decisions are informed by a countywide perspective. The COO works with DCM divisions, County departments, and elected officials to establish operational priorities and policy objectives. The directors of the Department of County Human Services, Health Department, Department of County Assets, Department of Community Services, Department of Community Justice, and Library are supervised by the COO, providing a crucial link between corporate policy setting and department implementation.

The Business Services program provides business and financial services for the department including: budget development, accounts receivable, accounts payable, grant accounting, procurement and contracting as well as administrative and general accounting support.

Capital Assets Strategic Planning is responsible for the creation and maintenance of a long-term countywide capital asset management master plan.

Significant Changes

A scaled program offer (72000B), Organizational Development, is offered for FY 2019. It includes the anticipated cost for a human resources consultant and one year of a limited duration management assistant to help implement the recommendations identified by the consultant. The County hired a human resources consulting firm in FY 2018 to review and analyze County Human Resources policies and practices to identify where County policies and practices may support or further institutional racism and oppression and/or create unjust barriers for employees in protected classes. This firm will produce a comprehensive report and detailed recommendations.

A scaled program offer (72000C), Workforce Equity Strategic Plan Implementation, for the facilitation and implementation of the Workforce Equity Strategic Plan over the next four years is also included for FY 2019.

Budget Office

The Budget Office guides the development of the county's budget process, prepares the annual budget and supports the Chair and the Board of County Commissioners in their budgeting decisions by helping align the county's annual spending plan with their priorities. It serves as a liaison between departments, elected officials and the community in communicating policy direction and program priorities, coordinating strategic planning and providing technical expertise, training, program and management analysis.

The Budget Office leads the countywide budget process, evaluates county policies and operations, and recommends redirection of policy or resources.

The Budget Office is responsible for the following:

- Preparing the annual budget, budget in brief, and associated documents;
- Financial forecasting and budget projections;
- Ad hoc analysis for County Management and the Chair's Office; and
- Countywide research on workforce equity and operational effectiveness.

Staff assist departments by providing information and training on financial management, planning, budgets, and expenditure and revenue forecasting. Budget staff serve on countywide task forces related to budget, finance and other policy and fiscal matters; identify and resolve financial problems; and support County labor relations in collective bargaining and cost analysis.

Significant Changes

The Mental Health System Analysis Follow-Up program (72042) is one-time-only General Fund funding to facilitate implementation of recommendations from the FY 2018 mental health system mapping work. The funds will pay for a consultant to work with the Evaluation and Research Unit to do this work.

Finance and Risk Management

The Finance and Risk Management Division provides a wide variety of services to ensure the county's financial transactions are managed in a timely and accurate manner, and establishes policies and procedures that guide how those transactions are made by County departments.

The various units within the division pay the county's bills, maintain and record accounting transactions, manage an investment portfolio that averages nearly \$500 million per day, and issue payroll checks. The division is responsible for managing the County's debt obligations, ensuring that vendors who receive federal funding are in compliance with applicable rules, and providing oversight, and setting policy, for the County's contracting process. Risk Management negotiates insurance coverage for the county's buildings, manages claims associated with work-related injuries, consults on workplace safety and health, and manages claims for the county's self-insured liability program. The Economic Development program leverages existing county programs and policies to enhance the competitiveness of local businesses.

Finance and Risk Management is responsible for preparing the county's Comprehensive Annual Financial Report (CAFR). The CAFR has been awarded the Government Finance Officers Association (GFOA) award for distinguished reporting every year for the past 33 years. Staff members in the division serve in leadership positions on statewide professional organizations and advisory boards. This serves as recognition by our peers of the ways Finance and Risk Management programs strive for innovative solutions.

Significant Changes

A program specialist position and associated costs from FY 2018 program offer 72021, MWESB Contract Compliance, are being rolled into Purchasing (72005) for administrative simplicity. The position serves the County's two significant capital construction projects and is central to validating their compliance with the County's MWESB program.

Treasury (72008) experienced a \$25,000 increase in banking fees that should be offset by increased investment earnings.

Responsibility for making payments to the City of Portland's Neighborhood Prosperity Initiative (NPI) was moved to Non-Departmental program offer 10027.

Purchasing (72005) will partner with Metro in a regional initiative to identify strategies to provide reliable career pathways for people of color and women in the construction trades.

Additionally, a new program related to Purchasing, Construction Diversity and Equity (72044), will ensure that County construction projects provide a fair opportunity for firms to compete for contracts regardless of owner ethnicity, gender, disability or firm size.

Central Human Resources

The Central Human Resources Division is driven by its strategic plan mission: "Supporting the people who serve our community."

The Central Human Resources division provides strategic leadership, recommends policy, and partners with the department HR units to guide consistent, efficient and cost-effective HR processes and practices necessary to achieve results across the organization.

The Chief Human Resources Officer ensures HR processes are aligned with county-wide goals and oversees evaluation of HR contributions to organizational effectiveness. Central Human Resources manages the following services and systems to support employees, managers as well as the business needs of the county:

- Collective bargaining and labor contract interpretation;
- Personnel rules and County HR policy development and interpretation;
- Job classification & compensation plans;
- Countywide training and organizational development;
- HR process monitoring and evaluation;
- Recruitment and retention systems and processes;
- Employee Benefits and Wellness programs;
- Management of the finance, human capital management and payroll modules in Workday.

Significant Changes

With the launch of the County's new Enterprise Resource Planning (ERP) system, Central Human Resources will manage the finance, human capital management (HCM) and payroll modules in Workday. This budget creates the DCM Workday Management Team that provides strategic and operational leadership for Workday finance, HCM and Payroll. This unit partners with Central HR functions, Department HR and Finance staff, the IT ERP Governance committee, and the many stakeholder groups across the county that consume data to analyze and improve business processes while leveraging the return on process improvement and technical capabilities.

Division of Assessment, Recording and Taxation (DART)

The Division of Assessment, Recording and Taxation (DART) maintains the statutorily required functions of the County Assessor, Tax Collector and certain County Clerk functions, including Recording, Marriage Licenses, Domestic Partnership Registrations, Passports and the Board of Property Tax Appeals.

Overall, DART maintains approximately 340,000 property tax accounts, calculates tax levies, certifies the tax roll, produces tax statements, processes payments and distributes property taxes to 69 taxing districts. The Division provides customer service for all its functions, maintains ownership records and property descriptions, and is responsible for the management and disposition of the County's tax foreclosed property.

Significant Changes

Multnomah County continues to experience growth. For FY 2018, DART Appraisal added taxable exception value of \$3.5 billion. DART's Customer Service Section saw similar increases from previous years in services provided: overall inquiries increased from 120,000 to 124,000, marriage licenses and domestic partnership registrations increased from 7,900 to 8,000 and, once again, passport applications saw the largest increase from 11,935 to 14,487 applications, a 21% increase year over year.

To manage its existing workload, as well as that from new construction, DART has relied heavily on process improvement efforts that collaboratively facilitate review, discussion and change to processes within work units. For FY 2018 and FY 2019, these efforts have intensified as DART replaces its 20 year old assessment and taxation software system. The new system, ORION, will enable DART to utilize technology to develop a more mobile workforce. Staff will be able to take laptops and tablets into the field, map their assignments in advance, change inventory characteristics, sketch diagrams; all without having to return to the office. The integration with GIS tools will enable appraisers to view properties across an entire neighborhood, easily identifying outliers for further investigation. The efficiencies and opportunities created by ORION will improve the accuracy and consistency of our valuations while maintaining compliance with Department of Revenue standards.

Department of County Management

The following table shows the programs that make up the department's total budget. The individual programs follow in numerical order.

Prog. #	Program Name	FY 2019 General Fund	Other Funds	Total Cost	FTE
DCM Director's Office					
72000A	DCM Director's Office	\$527,133	\$0	\$527,133	2.00
72000B	Organizational Development	284,998	0	284,998	0.00
72000C	Workforce Strategic Equity Plan	500,000	0	500,000	1.00
72013	Capital Assets Strategic Planning	279,576	0	279,576	1.00
72015	DCM Business Services	1,179,854	0	1,179,854	8.50
Budget Office					
72001	Budget Office	1,976,886	0	1,976,886	10.00
72014	Evaluation and Research Unit	454,086	0	454,086	3.00
72042	Mental Health System Analysis Follow-up	100,000	0	100,000	0.00
Finance and Risk Management					
72002	FRM Accounts Payable	934,645	0	934,645	7.60
72003	FRM Chief Financial Officer	1,506,694	278,041	1,784,735	2.95
72004	FRM General Ledger	929,038	0	929,038	7.00
72005	FRM Purchasing	2,404,024	107,073	2,511,097	19.50
72006	FRM Property & Liability Risk Management	0	3,906,799	3,906,799	2.50
72007	FRM Payroll/Retirement Services	1,045,171	0	1,045,171	8.45
72008	FRM Treasury and Tax Administration	2,077,145	0	2,077,145	4.00
72009	FRM Worker's Compensation/Safety & Health	0	3,445,099	3,445,099	6.00
72010	FRM Recreation Fund Payment to Metro	0	51,400	51,400	0.00
72011	FRM Economic Development	0	190,021	190,021	1.00
72012	FRM Fiscal Compliance	386,273	0	386,273	3.00
72044	Construction Diversity and Equity	100,000	0	100,000	0.00
Central Human Resources					
72016	Central HR Administration	1,527,127	0	1,527,127	4.63
72017	Central HR Services	1,840,349	0	1,840,349	10.00
72018	Central HR Labor Relations	1,095,867	62,583	1,158,450	5.85
72019	Central HR Unemployment	0	1,007,191	1,007,191	0.15

County Management

fy2019 adopted budget

Prog. #	Program Name	FY 2019 General Fund	Other Funds	Total Cost	FTE
Central Human Resources (cont.)					
72020	Central HR Employee Benefits	0	112,146,404	112,146,404	14.12
72022	DCM Workday Management Team	0	1,152,068	1,152,068	6.00
Division of Assessment, Recording and Taxation (DART)					
72023	Div of Assessment, Recording & Taxation Administration	815,409	0	815,409	3.80
72024	DART Customer Service	1,223,290	0	1,223,290	9.10
72025A	DART County Clerk Functions	1,652,851	0	1,652,851	13.50
72025B	DART County Clerk Carryover	150,000	0	150,000	0.00
72026	DART Ownership	451,818	0	451,818	4.20
72027	DART Tax Revenue Management	1,941,107	0	1,941,107	12.00
72028	DART GIS/Cartography & Parcel Management	1,133,822	0	1,133,822	8.30
72029	DART Assessment Performance Analysis	366,069	0	366,069	2.30
72030	DART Property Assessment Special Programs	1,097,095	0	1,097,095	8.25
72031	DART Personal Property Assessment	1,574,015	0	1,574,015	11.25
72032	DART Property Assessment Industrial	1,116,686	0	1,116,686	8.25
72033	DART Commercial Property Appraisal	2,167,003	0	2,167,003	15.25
72034	DART Residential Property Appraisal	4,486,051	0	4,486,051	31.00
72035	DART Assessment & Taxation System Upgrade	0	2,043,268	2,043,268	0.00
72036	DART Residential Development Program	760,225	0	760,225	0.00
72037	DART Applications Support	1,648,032	0	1,648,032	5.70
72038	DART Tax Title	910,040	0	910,040	1.60
	Total County Management	\$40,642,379	\$124,389,947	\$165,032,326	262.75

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Department: County Management **Program Contact:** Marissa Madrigal
Program Offer Type: Administration **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Director's Office manages the organizational health of the entire county and sets administrative policy. The areas of responsibility with countywide implications include Budget, Finance, Property Assessments & Recording, Tax Collections and Human Resources. The Director is also the County's Chief Operating Officer.

Program Summary

The Director works with the Chief Financial Officer, Budget Director, and Chief Human Resources Officer to develop and present administrative, financial, human resource and infrastructure guidelines and policies to the County Chair, the Board of County Commissioners (Board), and department directors. The Director works with DCM division directors, Chair, Board, and department directors to set priorities and ensure County policies follow those priorities. The Director works with departments and human resource personnel to recruit, train and retain a diverse workforce; provides management for county-wide projects identified by the Chair's Office; and works with the Board, the Department of County Assets (DCA) and other departments on the funding policies for the County's physical infrastructure.

The Director serves as the Executive sponsor for the Enterprise Resource Planning (ERP) System Steering Committee.

In FY 19, the director will work closely with a human resources consulting firm, the Office of Diversity and Equity, Central and Department Human Resources Offices, County leadership, and representatives from County Employee Resource Groups to identify and address how County procedures and practices may perpetuate structural racism.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Monthly monitoring of countywide performance and organizational health	5	12	12	12
Outcome	Facilitate countywide governance through regular convening of leadership groups (e.g. Leadership Council)	100%	0%	100%	100%
Output	County-wide executive leadership training events held	4	4	3	4
Output	Regional multi-jurisdictional leadership events held	1	1	1	1

Performance Measures Descriptions

Legal / Contractual Obligation

ORS 208, 238, 288, 294, 295, 310 and many other Oregon Revised Statutes, Multnomah County Code, Chapters 7, 9, 11 and 12 and County Charter requires the county to maintain appropriate personnel, infrastructure, taxation and financial system operations.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$407,477	\$0	\$431,825	\$0
Contractual Services	\$61,754	\$0	\$61,754	\$0
Materials & Supplies	\$11,200	\$0	\$11,200	\$0
Internal Services	\$35,578	\$0	\$22,354	\$0
Total GF/non-GF	\$516,009	\$0	\$527,133	\$0
Program Total:	\$516,009		\$527,133	
Program FTE	2.00	0.00	2.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72000 DCM Director's Office

Department: County Management **Program Contact:** Marissa Madrigal
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

In FY 2018, the County hired a human resources consulting firm to perform a detailed review and analysis of County Human Resources policies and practices to identify where County policies and practices may support or further institutional racism and oppression and/or create unjust barriers for employees in protected classes. This scaled program offer includes the anticipated cost for the consultant in FY 2019 and one year of a limited duration management assistant to help implement the recommendations identified.

Program Summary

The County is committed to providing an equitable, supportive, and inclusive work environment that fosters safety, trust, and a feeling of belonging for all its employees. In its Fiscal Year 2017 – 2019 Strategic Plan, Multnomah County Human Resources highlighted “Equitable and Empowering Practices” as one of four goal areas and committed to “end inequities and injustices in the work of human resources through an examination of how our policies, procedures and practices can perpetuate forms of institutional oppression.” However, employee data and testimony revealed that employees in protected classes continue to experience racism and other forms of bias, despite these commitments and County policies and practices designed to prevent this.

In FY 2018, the County hired a human resources consulting firm to perform a detailed review and analysis of County Human Resources policies and practices to identify where County policies and practices may support or further institutional racism and oppression and/or create unjust barriers for employees in protected classes. This firm will produce a comprehensive report and detailed recommendations.

This project will be led by the County Chief Operating Officer (COO). The consulting firm will work closely with the COO, the Office of Diversity and Equity, Central and Department Human Resources Offices, County leadership, representatives from County Employee Resource Groups and other county groups.

This scaled offer includes the estimated FY 2019 cost for the human resources consultant contract and one year of a limited duration management assistant to help implement the recommendations identified.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Produce a detailed narrative report with with concrete recommendations for changes to policies and practices	0	0	0	1
Outcome	Creation of a detailed plan to implement recommended improvements, including timelines and metrics	0	0	0	1

Performance Measures Descriptions

Legal / Contractual Obligation

Multnomah County Code Chapters 7 and 9. Federal, state, local laws, rules and regulations covering discrimination, harassment, privacy, and hiring.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$0	\$134,998	\$0
Contractual Services	\$0	\$0	\$150,000	\$0
Total GF/non-GF	\$0	\$0	\$284,998	\$0
Program Total:	\$0		\$284,998	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by County General Fund revenues.

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Marissa Madrigal
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

This scaled program offer is for the facilitation and implementation of the Workforce Equity Strategic Plan over the next four years.

Program Summary

This scaled program offer is for the facilitation and implementation of the Workforce Equity Strategic Plan over the next four years.

On September 14, 2017, the Board of County Commissioners adopted a resolution affirming the County's commitment to workforce equity and initiated a countywide project to create a workforce equity strategic framework. Developed over several months, and with the participation of employees from across the organization, the resulting Workforce Equity Strategic Plan identifies three goal areas: Organizational Culture, Promotion, and Professional Development and Retention.

The goals include multiple objectives with minimum standards and performance measures. To ensure these goals and objectives are actionable, the County must develop an implementation plan. And in order to establish accountability and create a sense of safety and trust with employees, strong project management, reporting tools, and ongoing communication will also be necessary.

This scaled offer includes \$250,000 in one-time-only money for professional services assistance in developing an implementation plan, facilitating the beginning states of the plan, and for anticipated training needs related to furthering workforce equity. The program offer also includes \$250,000 in ongoing funding; this funding will pay for 1.00 FTE for a program manager to oversee the future implementation, communication, and performance measurement, and will also fund anticipated ongoing programming or training needs.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Creation of a detailed plan to implement recommended improvements. including timelines & performance metrics	NA	NA	NA	1
Outcome	Percent of identified project milestones met on time (for the fiscal year in question).	NA	NA	NA	100%

Performance Measures Descriptions

Legal / Contractual Obligation

Federal statutes related to Americans with Disabilities, Equal Employment Opportunity/Affirmative Action, and Multnomah County Resolution Number 2017-077.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$0	\$216,657	\$0
Contractual Services	\$0	\$0	\$218,343	\$0
Materials & Supplies	\$0	\$0	\$65,000	\$0
Total GF/non-GF	\$0	\$0	\$500,000	\$0
Program Total:	\$0		\$500,000	
Program FTE	0.00	0.00	1.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by County General Fund revenues.

Significant Program Changes

Last Year this program was:

Department: County Management

Program Contact: Mike Jaspin

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Budget Office guides the development of the County's budget process, prepares the annual budget and supports the Chair and the Board of County Commissioners with their budgeting decisions by helping to align the County's annual spending plan with their priorities. It also serves as a liaison between departments, elected officials and the community in communicating policy direction and program priorities, coordinating strategic planning and providing technical expertise, training, program, and management analysis.

Program Summary

The Budget Office leads the countywide budget process, evaluates County policies and operations, and recommends redirection of policy and/or resources.

The Budget Office does the following:

- Prepares the annual budget, budget in brief and associated documents
- Financial forecasting and budget revenue/expenditure projections
- Ad hoc analysis for County Management and the Chair's Office
- Countywide cost control analyses
- Prepares the supplemental budget and maintains the legal budget throughout the course of the year

Staff also assist departments in measuring performance of County programs; providing information and training on financial management, planning, budgets, and expenditure and revenue forecasting. Budget staff serve on countywide task forces related to budget, finance and other policy or fiscal matters; identify and resolve problems; and support County Labor Relations in collective bargaining research and detailed cost analysis.

Over the past 15 years, the County has received the Government Finance Officers Association's (GFOA) Distinguished Budget Annual Award. The award represents a significant achievement by the County. It reflects the commitment of Multnomah County's governing body and staff to meet the highest principles of governmental budgeting.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of budget modifications processed (includes internal)	193	200	195	200
Outcome	% of budget modifications entered into SAP within 4 weeks of Board approval	91%	95%	95%	95%
Quality	Percent error in General Fund Revenue Forecast	1.93%	2.0%	0.75%	2.0%
Quality	% of customers rating Budget Office efforts as either "good" or "excellent" *	93%	92%	92%	92%

Performance Measures Descriptions

*Because the budget process ends prior to the beginning of the fiscal year, the FY 2018 estimate is the "actual" customer satisfaction rating.

Legal / Contractual Obligation

The Budget Office is not mandated, but the County is subject to Oregon Budget Law, ORS Chapter 294 & sections of ORS Chapters 280 & 310 related to filing and ballot title wording. The office is responsible for producing a financially sound budget that complies with the law and communicating the outcome from public funds entrusted to the County.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$1,530,739	\$0	\$1,575,226	\$0
Contractual Services	\$32,000	\$0	\$32,000	\$0
Materials & Supplies	\$117,287	\$0	\$117,766	\$0
Internal Services	\$242,321	\$0	\$251,894	\$0
Total GF/non-GF	\$1,922,347	\$0	\$1,976,886	\$0
Program Total:	\$1,922,347		\$1,976,886	
Program FTE	10.00	0.00	10.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72001 Budget Office

Department: County Management

Program Contact: Mike Waddell

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

Central Accounts Payable supports County programs in the areas of vendor payment processing, auditing and data integrity, travel and training audits, procurement card administration, vendor master file management and County Administrative Procedures compliance monitoring.

Program Summary

Central Accounts Payable (AP) processes approximately 125,000 vendor invoice payments and refunds annually; this includes check payments, electronic payments and intergovernmental funds transfers. AP administers the purchasing card program and facilitates the establishment and monitoring of petty cash accounts countywide; furthermore, it coordinates the year-end expenditure accruals; conducts internal audits of AP functions while ensuring that vendor payments are paid in an accurate and timely manner and are compliant with applicable internal controls, administrative procedures and government accounting practices. AP coordinates/prepares documentation for external audits and is responsible for maintaining accurate vendor records for payment and tax reporting purposes. AP also establishes and communicates clear and uniform county administrative practices and procedures related to AP functions. In addition, AP provides one-on-one technical assistance/training and also hosts information forums and periodic finance related user-group meetings for the purpose of informational updates, group training, and peer/professional support which ultimately contribute to staff competencies.

Central Accounts Payable promotes continuous process improvement by exploring/adopting AP best practices while leveraging technology to evolve the AP function from a paper intensive payment process to a more sustainable, electronic payment process. This single objective has reduced the cost of government by providing operating efficiency while maintaining internal controls and supporting the County's sustainability goals.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Payments Processed	135,306	128,000	124,722	128,000
Outcome	Percent of Invoices Paid On Time within std NET 30	83.1%	87%	86.4%	87%
Outcome	Percent of Total Payments that are Electronic	68.9%	72%	70.9%	72%
Outcome	Procurement Card Rebates	\$299,218	\$290,000	\$278,000	\$290,000

Performance Measures Descriptions

Invoice payments processed will decrease as we progress to more consolidated billings, electronic payments and growth in Multco Marketplace activity. Net payment is due 30 days after receipt of original invoice. Percent of total payments that are electronic--growth correlates with more cost effective electronic payment methods including ACH, ePayables and Pcards. Procurement Card Rebates are directly associated with the total amount spent in the P-Card system. Rebate projection same as previous year during ERP transition year.

Legal / Contractual Obligation

Tax Information Returns (i.e. 1099 MISC, 1099 INT, etc.) are mandated by the Internal Revenue Service code as described in Sections 1.6001-1 through 1.6091-4. Failure to comply would result in the County being assessed penalties and fines.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$848,484	\$0	\$924,271	\$0
Materials & Supplies	\$16,748	\$0	\$10,374	\$0
Total GF/non-GF	\$865,232	\$0	\$934,645	\$0
Program Total:	\$865,232		\$934,645	
Program FTE	7.60	0.00	7.60	0.00

Program Revenues				
Other / Miscellaneous	\$290,180	\$0	\$290,180	\$0
Total Revenue	\$290,180	\$0	\$290,180	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Rebates are the only Central Accounts Payable revenue. Rebates, received from U.S. Bank and Bank of America, are based on the level of annual spending in each of the bank's credit card programs. The majority is from Bank of America's purchasing card program; rebates from BOA are generally 1.4% of total value of transactions processed annually. Multnomah County is part of the Bank of America Procurement Card Consortium of local governments which, as a group, has leveraged competitive rebate terms.

Significant Program Changes

Last Year this program was: FY 2018: 72002 FRM Accounts Payable

Department: County Management

Program Contact: Mark Campbell

Program Offer Type: Administration

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Chief Financial Officer manages the financial health of the entire County and sets administrative policy related to financial management. Direct responsibilities include Accounts Payable, General Ledger, Fiscal Compliance, Risk Management, Payroll, Retirement Programs, Tax Administration, Central Purchasing and Treasury.

Program Summary

The Chief Financial Officer (CFO) develops and presents financial guidelines to executive level staff, the County Chair's Office, and the Board of County Commissioners. The CFO presents recommendations related to public financial policy to these groups as well as other jurisdictions. The CFO interacts with the Oregon Legislature, the general public, and the business community in assessing the potential impact of changes in financial policy. The CFO also develops and/or suggests financing alternatives to executive level staff and jurisdiction partners.

The CFO monitors the Public Employees Retirement System (PERS) and works with partner jurisdictions to develop and present legislative policy. This involves communication with the Board, the Oregon Legislature and/or PERS Board and labor groups. The CFO works with the Budget Office, the Chair's Office, the Board and County departments to establish priorities and guidelines, and ensures that policies are aligned with these priorities. The CFO works with departmental finance sections, DCM divisions, and all County department stakeholders on all administrative policies and procedures.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Comprehensive Annual Financial Report is issued according to legal requirements	1	1	1	1
Outcome	Maintain County's high bond rating of Aaa	1	1	1	1

Performance Measures Descriptions

The Comprehensive Annual Financial Report is a primary product of the Finance Division. Statutes require that it is issued within six months of the close of the fiscal year. 1=achieved; 0=not achieved.

County maintains the highest bond rating of Aaa on general obligation debt. This rating is achieved by continuing to demonstrate prudent financial management. 1=achieved; 0=not achieved.

Legal / Contractual Obligation

Several financial functions laid out in Oregon Revised Statutes and County Code are directly and indirectly the responsibility of the Chief Financial Officer.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$458,656	\$75,275	\$488,392	\$80,403
Contractual Services	\$30,000	\$0	\$19,500	\$0
Materials & Supplies	\$27,000	\$0	\$15,500	\$0
Internal Services	\$885,272	\$148,700	\$983,302	\$197,638
Total GF/non-GF	\$1,400,928	\$223,975	\$1,506,694	\$278,041
Program Total:	\$1,624,903		\$1,784,735	
Program FTE	2.60	0.35	2.60	0.35

Program Revenues				
Other / Miscellaneous	\$0	\$223,975	\$0	\$223,975
Total Revenue	\$0	\$223,975	\$0	\$223,975

Explanation of Revenues

This program is supported by General Fund and Risk Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72003 FRM Chief Financial Officer

Department: County Management **Program Contact:** Samina Gillum
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The General Ledger program manages central financial accounting and reporting, including the annual external financial audit, the indirect cost allocation plan, the comprehensive framework of internal controls, as well as general countywide accounting support and assistance.

Program Summary

The General Ledger (GL) program supports and monitors the County's financial accounting activity by performing corporate level accounting functions including account reconciliations, review/approval of accounting transactions and preparing required financial reports.

The primary product is the County's Comprehensive Annual Financial Report (CAFR), which includes all activities associated with the required annual external financial audits. The CAFR earns the Government Finance Officers Association (GFOA) award annually for excellence in financial reporting. This award indicates management has prepared financials that meet the reporting standards and requirements noted by GFOA. Approximately 3% of governmental entities in the United States receive this award annually.

General Ledger prepares the County's cost allocation plan needed to recover central and departmental overhead and administrative indirect costs from external revenue sources. GL also maintains internal controls and the chart of accounts.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of properly stated balance sheet accounts per review of external auditors	300	300	300	300
Outcome	Number of Comprehensive Annual Financial Report audit deficiency comments from external auditors	0	0	0	0
Quality	Number of days Comprehensive Annual Financial Report is completed after fiscal year end	215	174	174	174

Performance Measures Descriptions

Fewer balance sheet accounts identified with misstatements indicate a high degree of accuracy in the financial statements (CAFR) and effective internal controls are in place (approx. 300 total accounts). External auditors express their opinion on the County's CAFR, including assessment of the risks of material misstatement of the financial statements. "0" means the auditors identified no deficiencies or weaknesses in internal controls. Financial reports should be issued soon enough after the close of a period to affect better decision making.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS), Ch. 297: Audits of Public Funds and Financial Records, requires governments to have an external audit and that it be submitted to the Secretary of State - Audits Division.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$800,915	\$0	\$910,288	\$0
Contractual Services	\$6,500	\$0	\$6,500	\$0
Materials & Supplies	\$23,640	\$0	\$12,250	\$0
Total GF/non-GF	\$831,055	\$0	\$929,038	\$0
Program Total:	\$831,055		\$929,038	
Program FTE	7.00	0.00	7.00	0.00

Program Revenues				
Service Charges	\$17,000	\$0	\$20,000	\$0
Total Revenue	\$17,000	\$0	\$20,000	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

External revenue is received from the County's separately issued component unit financial reports: Mid County Service District, Dunthorpe-Riverdale Service District and the Library District. The revenues are a reimbursement for central accounting and reporting services provided to each component unit.

Significant Program Changes

Last Year this program was: FY 2018: 72004 FRM General Ledger

Department: County Management

Program Contact: Brian Smith

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

Purchasing oversees the County's goods and services procurement activities and provides leadership, expertise, and training to employees who perform purchasing functions. Purchasing supports departments to procure products and services in construction, materials, and both non-professional and professional services. Purchasing ensures appropriate and cost-efficient public procurement and contracting practices, including evaluating the economic, social and environmental impacts of purchases.

Program Summary

Purchasing provides leadership, policy oversight and monitoring, contract procurement, compliance, staff training, support services and overall accountability for several thousand contracts and hundreds of millions of dollars awarded each year.

Key efforts include the following: (1) safeguard the County from potential contractual risk and liability exposure; (2) ensure products and services are purchased in accordance with federal and state laws, procedures and regulations including County Administrative Procedures and rules established by Multnomah County's Public Contract Review Board (PCRB); (3) review and approve contract documents, review and approve contract changes and/or amendments and maintain official contract records; (4) research, analyze, recommend, and implement best business practices; (5) provide ongoing guidance, support, training, and consultation to departments and employees; (6) track, monitor, analyze and annually report on contract data and performance measures; (7) maximize efforts to include and ensure participation of Minority, Women and Emerging Small Businesses (MWESB), Service Disabled Veterans, and Qualified Rehabilitation Facilities (QRF); (8) participate in community events, meetings and conduct outreach to the MWESB supplier community; (9) oversee the County's surplus program; and (10) develop and implement sustainable purchasing policies, procedures and training.

Purchasing supports the County's sustainability goals by ensuring sustainable practices of prospective suppliers, contractors and service providers are included as evaluation criteria in all contract awards over \$10,000. All Purchasing staff share in the education, training, and support of County staff to promote and support sustainable purchasing practices.

Central Purchasing will partner with Metro in a regional initiative, Construction Career Pathways Project (C2P2) to identify strategies to provide reliable career pathways for people of color and women in the construction trades. The Supplier Diversity Officer will participate in a Public Owner Workgroup organized by Metro. The workgroup is charged with developing and adopting a regional approach to construction workforce equity.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Percent of contracts awarded to MWESB and QRF businesses	8%	20%	8%	8%
Outcome	Number of sustained protests on formal procurements	0	0	0	0
Output	Number of formal RFP and Bid solicitations issued	48	50	60	50
Output	Number of contracts and amendments processed	995	965	965	965

Performance Measures Descriptions

Purchasing manages formal Request For Proposal (RFP) and bid solicitations (>\$150,000) for the County because they represent the greatest risk in the County's purchasing activity. Minimizing the number of sustained protests is an indicator of how well Purchasing is managing the risks associated with formal procurement processes. The output measures listed are good indicators of the volume of formal procurements we conduct and the contract processing activity across all County departments.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) 279A, 279B, and 279C establish requirements affecting the County's procurement and contracting practices. The County establishes and implements Public Contract Review Board (PCRB) Rules and Administrative Procedures CON-1 and PUR-1 to define its procurement and contracting processes within the constraints of ORS requirements.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$2,203,725	\$113,861	\$2,233,796	\$102,073
Contractual Services	\$13,219	\$0	\$38,219	\$0
Materials & Supplies	\$132,009	\$5,000	\$132,009	\$5,000
Total GF/non-GF	\$2,348,953	\$118,861	\$2,404,024	\$107,073
Program Total:	\$2,467,814		\$2,511,097	
Program FTE	19.00	1.00	18.50	1.00

Program Revenues				
Other / Miscellaneous	\$2,000	\$0	\$2,000	\$0
Total Revenue	\$2,000	\$0	\$2,000	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

External revenues are generated primarily when fees are collected for services performed in response to public records requests, and when County surplus is sold through the surplus program. The estimate from these sources for FY 2019 is \$2,000.

Significant Program Changes

Last Year this program was: FY 2018: 72005 FRM Purchasing

This program offer includes a position added in FY 2018 as program offer 72021. It is being rolled into this program offer for administrative simplicity. The position serves the County's two significant capital construction projects and is central to validating their compliance with the County's MWESB program.

Reduced 0.50 FTE administrative position for FY 2019.

Department: County Management **Program Contact:** Michelle Cross
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Property & Liability Risk Program (P&LRP) manages the County's property and liability risks in accordance with all legal requirements and County policies/procedures. It focuses on countywide risk exposures, liability/subrogation claims, property claims, purchasing insurance, loss control/prevention, and assists departments in managing identified risks.

Program Summary

Each year, the Property & Liability Risk Program (P&LRP) seeks to determine the County's "Cost of Risk", benchmark against other entities and continually improve the program by implementing best practices. The (P&LRP) purchases property insurance, marine coverage, crime coverage, excess liability, excess medical malpractice coverage, bonds, and other specialized insurance coverage for the County. Where the cost of insurance prohibits purchase or coverage is not available, we self fund losses. The P&LRP recommends the types/limits of insurance for contracts, recommends the purchase of specialized insurance and develops countywide policies and procedures related to loss prevention and control. The P&LRP designs and implements risk management strategies for the prevention of risk exposure and property and liability loss countywide. The program adjusts property loss claims, and oversees the Third Party Administrator contracted to process general liability insurance claims for the County. Litigation and large general liability insurance claims are settled with expertise from the County Attorney's Office. The County chooses to "self-insure" (retain a certain amount of financial exposure to loss) and purchases property and excess liability coverage for large property and liability related claims. This decision controls the loss adjustment process, minimizes our "total cost of risk" (uninsured claims costs + insurance costs + administrative costs), and motivates internal loss control behavior. A department's internal property and liability allocated charges are based on their past losses using actuarial data and historical loss data to determine cost percentage rates based on anticipated future losses.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of policies for insured risks and statutory bonds purchased/renewed*	17	17	17	17
Outcome	Total Cost of Risk**	.46	.59	.67	.59

Performance Measures Descriptions

*Appropriate types of insurance coverage indicate strong safeguarding of the county's assets.

**Total Cost of Risk is measured and compared annually to other public entities. It provides information on the financial impact of the county's risk assumption (value approaching zero is preferable, 1=average of public entities)

Legal / Contractual Obligation

The Property & Liability Risk Program is mandated by County Code 7.100-7.104. The County is required by the State to have specific insurance and bond coverage. The County is self-insured for third-party liability in accordance with the provisions of the Oregon Tort Claims Act, ORS 30.270 and purchases Excess General Liability insurance above the self-insured retention of \$1,000,000. The required Public Official Bonds, DEQ Bonds, and Pharmacy Bond are purchased in accordance with State requirements. The P&LRP manages the County's compliance with numerous Oregon Occupational Safety and Health Administration (OR-OSHA) and Life Safety requirements to promote employee and public safety, including driver's license validation program and inspections by regulatory and insurance carrier representatives.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$323,810	\$0	\$339,884
Contractual Services	\$0	\$230,105	\$0	\$266,758
Materials & Supplies	\$0	\$3,037,070	\$0	\$3,300,157
Total GF/non-GF	\$0	\$3,590,985	\$0	\$3,906,799
Program Total:	\$3,590,985		\$3,906,799	
Program FTE	0.00	2.50	0.00	2.50

Program Revenues				
Other / Miscellaneous	\$0	\$3,590,985	\$0	\$3,906,799
Total Revenue	\$0	\$3,590,985	\$0	\$3,906,799

Explanation of Revenues

Departments are charged a risk property & liability rate based on claims experience and an actuarial valuation performed every three years. The P&LRP also receives subrogation money and reimbursement related to liability claims.

Significant Program Changes

Last Year this program was: FY 2018: 72006 FRM Property & Liability Risk Management

Department: County Management **Program Contact:** Vanessa Witka
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Central Payroll is responsible for paying the employees of Multnomah County, ensuring compliance with Federal, State, and local wage and hour laws, withholding and remitting employment taxes and other deductions, issuing wage and tax reporting statements and administering the pension and deferred compensation programs.

Program Summary

Central Payroll produces 24 payrolls per year for all Multnomah County employees and is responsible for accurately withholding, reporting and remitting employment taxes to Federal, State and Local taxing authorities. Payroll reports and remits pension contributions to the Public Employees Retirement System and administers the County's IRC §457 deferred compensation program. Payroll ensures that timekeeping and wage payments are done in compliance with Federal and State wage and hour laws, labor contracts and County Administrative guidelines. Payroll reconciles and remits mandated deductions for creditor garnishments, child support, bankruptcies, tax levies and union dues. Payroll reconciles and produces year-end tax statements for employees (W2's) and vendors (1099's) of Multnomah County following strict federal and state regulations.

Payroll protects County funds by ensuring that employment taxes, wage and tax statements, and pension payments are processed and remitted timely to avoid assessment of fines for noncompliance. The program supports the County's sustainability goals by providing electronic disbursements of wages to employees' financial institutions and providing paperless notification of their deposits. Currently 98% of employees participate in direct deposit of funds and of those, 95% receive the notification of deposit via email.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Average number of payments issued per period*	7,367	7,300	7,151	7,200
Outcome	Percent issued without error*	99%	99%	99%	99%
Output	Percent of employees participating in Deferred Comp**	58%	56%	59%	62%

Performance Measures Descriptions

*Number of payments per pay period exceeds number of employees due to many employees having multiple direct deposits. Payroll has consistently maintained a high level of system accuracy (99%).

**The percent of employees participating in the deferred compensation plan will measure the effectiveness and quality of the educational opportunities offered. The national average for participation is 45%.

Legal / Contractual Obligation

Wage payments are mandated by Federal & State wage and hour laws, 11 union contracts, and Multnomah County Personnel Rules. Withholding and remitting employment taxes is mandated by the Internal Revenue Service and the Oregon Dept of Revenue. Pension contributions are mandated by union contracts, Multnomah County Personnel Rules and Oregon Revised Statutes. Failure to comply with these laws and regulations result in fines and penalties being assessed.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$875,448	\$0	\$1,003,912	\$0
Contractual Services	\$23,000	\$0	\$19,500	\$0
Materials & Supplies	\$30,160	\$0	\$21,759	\$0
Total GF/non-GF	\$928,608	\$0	\$1,045,171	\$0
Program Total:	\$928,608		\$1,045,171	
Program FTE	8.45	0.00	8.45	0.00

Program Revenues				
Other / Miscellaneous	\$151,998	\$0	\$155,718	\$0
Total Revenue	\$151,998	\$0	\$155,718	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

External revenues for the deferred compensation program are contractually negotiated with the County's deferred compensation provider through a revenue sharing agreement. All administrative costs associated with the program are paid for through the agreement. The revenue sharing enables the County to offer the program to employees at no cost to the County. The estimated reimbursement for FY 2018 is \$138,718 and is adjusted each following year by the Portland CPI-U amount. The remaining \$17,000 is miscellaneous revenue.

Significant Program Changes

Last Year this program was: FY 2018: 72007 FRM Payroll/Retirement Services

Department: County Management **Program Contact:** Eric Arellano
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Treasury manages the County's cash assets, investment portfolio, debt, banking services and relationships and broker/dealer relationships. Treasury also manages the Excise Tax Administration program which includes management of revenue collections for Motor Vehicle Rental Tax (MVRT), Transient Lodging Tax (TLT) and Business Income Tax (BIT) in accordance with Multnomah County Code, the County's fiduciary responsibilities and revenue & taxation policies and procedures.

Program Summary

Treasury invests the County's financial assets to ensure that funds are available to meet anticipated cash flow needs. Investment earnings are measured against specific benchmarks outlined in the Investment Policy. Treasury complies with all applicable laws, policies and best practices in the management of County funds.

Treasury supports the Chief Financial Officer in the issuance of debt, including opportunities to refinance existing debt and maintains contact with rating agencies. It ensures timely and accurate debt service payments and generates arbitrage rebate calculations and reports. Treasury regularly analyzes cash flow. From time to time it is necessary to issue short term Tax and Revenue Anticipation Notes (TRANS) to provide liquidity prior to the collection of property taxes in November.

The County collects and administers three excise taxes. A Business Income Tax (BIT) is assessed against businesses with income generated within the County. It is set at a rate of 1.45% of net income. BIT is the second largest revenue source in the General Fund, generating approximately 16% of General Fund revenues. A Motor Vehicle Rental Tax (MVRT) is charged on the rental of cars and light trucks within the County. It is currently set at a rate of 17% of rental fees. A portion of the tax (2.5%) is passed through to the Visitors Development Fund to support tourist activities. A Transient Lodging Tax (TLT) is charged on the rental of hotel/motel rooms within the county. It is currently set at a rate of 11.5% of rental fees. Most of the revenue generated by the TLT is passed through to other entities. Cities retain 6%, another 3% is dedicated to operating the Oregon Convention Center, and 2.5% is passed through to the Visitors Development Fund.

Treasury maintains effective banking relationships to keep pace with technology and adapt to the needs of County Departments to provide better service to County residents.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Compliance with Investment Policy*	1	1	1	1
Outcome	Tax Returns Filed-Motor Vehicle and Transient Lodging**	323	380	630	640
Outcome	Ensure County's Cash Flow Needs are Met***	1	1	1	1
Output	Number of Business Accounts in County****	74,000	69,300	82,000	90,000

Performance Measures Descriptions

*Measurement Key: 1 = Goal Achieved, 0 = Not Achieved (ensures compliance to applicable ORS)

**The number of tax returns filed is a measure of compliance with applicable code requirements.

***Measurement Key: 1 = Goal Achieved, 0 = Not Achieved (ensures County meets its debt obligations)

****The number of business accounts is used as a workload measure and serves as an indicator of economic activity within the County.

Legal / Contractual Obligation

Oregon Revised Statutes ORS 294 and 295 (primarily ORS 294.035), Multnomah County Code Chapter 12 (BIT) and Chapter 11 (MVRT and TLT). The Business Income Tax is administered by the City of Portland through an intergovernmental agreement (IGA) that expires at the end of FY 2019.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$428,339	\$0	\$505,280	\$0
Contractual Services	\$1,492,094	\$0	\$1,558,415	\$0
Materials & Supplies	\$18,540	\$0	\$13,450	\$0
Total GF/non-GF	\$1,938,973	\$0	\$2,077,145	\$0
Program Total:	\$1,938,973		\$2,077,145	
Program FTE	4.00	0.00	4.00	0.00

Program Revenues				
Interest	\$120,000	\$0	\$120,000	\$0
Service Charges	\$154,000	\$0	\$154,000	\$0
Total Revenue	\$274,000	\$0	\$274,000	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

External revenue is received through an agreement between the County and the Visitors Development Fund Board. Under terms of the IGA that created the Visitors Development Fund the County receives an administrative fee equal to 0.7% of MVRT and TLT revenues recorded in the fund.

Investment earnings from the investment portfolio are allocated to this program to cover administrative fees for non-discretionary investment advisory services.

Significant Program Changes

Last Year this program was: FY 2018: 72008 FRM Treasury and Tax Administration

Department: County Management **Program Contact:** Michelle Cross
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Workers' Compensation section of this program manages the work-related employee injury and illness process and assists employees in returning to their jobs post injury or illness. The Safety and Health section oversees the loss prevention efforts of the County by assisting each department in meeting loss prevention requirements of a workers' compensation self-insured employer and Oregon Occupational Safety and Health Division (OR-OSHA) compliance.

Program Summary

This program provides workers' compensation benefits in accordance with state law. Multnomah County has been self-insured for this mandatory program since 1978. Claims are administered through a contract with a third-party administrator (TPA) with oversight and coordination of return to work from Risk Management staff. Staff work with employees, supervisors, physicians, the TPA, attorneys, managed care organizations and other vendors to accurately and timely process claim benefits for the injured employee. Internal Workers' Compensation section employees focus on service, cost containment and compliance efficiency. The Workers' Compensation section is responsible for the County's return-to-work program and follows state requirements necessary to benefit from the Workers' Compensation Division (WCD) Employer-At-Injury reimbursement program.

The primary activity of the Safety and Health section is reducing employee on-the-job injuries and employer liability due to injuries to non-employees. Safety and Health staff consult with County departments to assist them in providing a safe environment for both employees and the public. It helps identify and abate deficiencies related to occupational safety and health regulations. All employer-based loss prevention activity needed to maintain the workers' compensation self-insured status is managed by the Safety and Health staff and communicated to internal partners for implementation and program success.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	*Number of site safety visits to meet loss prevention consultative needs and satisfy OR-OSHA requirements	20	24	18	24
Outcome	**Workers' Compensation Experience Rating Modifier (ERM) below industry average	.87	.7	.78	.66

Performance Measures Descriptions

*Performance measures are designed to meet OR-OSHA Self-insured Employer OAR 437-001-1060 (2) & (7) rules and monitor our success as a self-insured employer. The loss prevention output tracks the Safety Specialists consultative service to employee safety and health at the work site level.

**The ERM demonstrates our success in impacting safety and loss prevention efforts countywide. 1.0 is industry standard, and less than 1.0 exceeds industry standard. Insurance industry sets our ERM annually based on past losses.

Legal / Contractual Obligation

MCC 7.102 and 7.103 establishes the safety and loss prevention program in the County. The Oregon Safe Employment Act, ORS 654, establishes minimum safety standards for employers. Oregon OSHA, as outlined in OAR 437-001-1005 through 1020 and 1050 through 1060, requires each self-insured employer to have a written loss prevention plan for each location and to provide safety and health loss prevention services for each work site.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$793,423	\$0	\$852,233
Contractual Services	\$0	\$338,755	\$0	\$361,800
Materials & Supplies	\$0	\$3,494,350	\$0	\$2,231,066
Total GF/non-GF	\$0	\$4,626,528	\$0	\$3,445,099
Program Total:	\$4,626,528		\$3,445,099	
Program FTE	0.00	5.50	0.00	6.00

Program Revenues				
Other / Miscellaneous	\$0	\$4,626,528	\$0	\$3,445,099
Total Revenue	\$0	\$4,626,528	\$0	\$3,445,099

Explanation of Revenues

The Workers' Compensation Section receives reimbursement from the State of Oregon for claims cost when specific eligibility criteria are met. Claim processing over payment reimbursements are also received as revenue. Safety and Health receives internal service reimbursements from departments whose staff attend the first aid/CPR/AED classes taught by Safety and Health instructors. The revenues received are to offset the cost paid to the Medic First Aid for course materials and completion certificates. The cost to Departments/Offices whose staff attend these internal classes are well below the cost of taking the class from an external provider.

Significant Program Changes

Last Year this program was: FY 2018: 72009 FRM Worker's Compensation/Safety & Health

Increased 0.50 FTE administrative position for FY 2019.

Department: County Management **Program Contact:** Mark Campbell
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Recreation Fund Payment to Metro program provides support funding to Metro for the operation and maintenance of community parks. The expenditures of the fund are pass-through payments to Metro under an intergovernmental agreement (IGA) the County entered into in 1994. The transactions for this program are recorded in the Recreation Fund.

Program Summary

This program's primary purpose is to provide funding to Metro to maintain and operate community parks which in turn build local communities and provide for recreational opportunities. The program's resources derive from Marine Fuel Tax apportioned to Multnomah County. The expenditures of the fund are pass-through payments to Metro under an IGA the County entered into in 1994.

These funds may be used to operate, administer and maintain the following Metro natural areas and regional facilities that were transferred from Multnomah County in 1994: Mason Hill Park, Sauvie Island Boat Ramp, Multnomah Channel Park, Bybee-Howell House and Park, Belle View Point, James Gleason Memorial Boat Ramp, Broughton Beach, Beggars Tick Marsh, Glendoveer Golf Course and Fitness Trail, Blue Lake Park, Gary and Flagg Islands, Oxbow Park, Indian John Island, Larch Mountain Corridor, Chinook Landing Marine Park, Sandy River Access Points, Smith & Bybee Lakes Addition, Phillipi Property and the Expo Center. Each of these sites offers a different recreational benefit for all citizens.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Payment Remitted in a Timely Manner	1	1	1	1
Outcome					

Performance Measures Descriptions

Under state law marine fuel taxes are allocated to counties based on the number of boat registrations and miles of waterway within the County. These revenues are turned over to METRO under terms of an IGA that transferred Multnomah County parks to METRO. 1 - Yes; 0 - No

Legal / Contractual Obligation

Pass-through payment under terms of the IGA that transferred parks from the County to METRO.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Contractual Services	\$0	\$85,000	\$0	\$50,000
Internal Services	\$0	\$2,287	\$0	\$1,400
Total GF/non-GF	\$0	\$87,287	\$0	\$51,400
Program Total:	\$87,287		\$51,400	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Taxes	\$0	\$87,287	\$0	\$51,400
Total Revenue	\$0	\$87,287	\$0	\$51,400

Explanation of Revenues

Revenues represent Multnomah County's share of state Marine Fuel Tax.

Significant Program Changes

Last Year this program was: FY 2018: 72010 FRM Recreation Fund Payment to Metro

Department: County Management **Program Contact:** Mark Campbell
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Economic Development program works with the Chief Financial Officer to leverage existing County programs and policies to enhance the competitiveness of local businesses, increase the economic success of all County residents, and engage Multnomah County businesses as vital members of the community.

Program Summary

The Economic Development program identifies opportunities to increase the stability and quality of the workforce, decrease unemployment and underemployment for all County residents, bring more capital and technical assistance to small businesses, and foster an environment where business and the broader community participate respectfully in constructive dialogue.

The program works with businesses, trade associations, labor groups, non-profit organizations, other County divisions, and other governments at the local, state and federal levels to identify, develop and pursue opportunities that will further program goals in both the near-term and long-term. Additionally, the program oversees and reports on the County's expenditures of State Video Lottery Funds, responds to requests regarding the Strategic Investment Program and other business incentives, and oversees the County's investment in the six Neighborhood Prosperity Initiative districts.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Compile annual report on State Video Lottery Fund expenditures	1	1	1	1
Outcome	County programs that form new, mutually-beneficial private sector partnerships	0	2	1	2

Performance Measures Descriptions

Reporting on the expenditures of State Lottery Funds increases transparency and accountability for the County's economic development efforts. Engaging businesses and other organizations with the County's service programs through win-win opportunities helps align public and private sector goals and improves the economic and business environment within the County.

Legal / Contractual Obligation

Pursuant to Oregon Laws 2011, chapter 385, section 1, each county must submit a report to the Oregon Department of Administrative Services containing information regarding the county's expenditure of State Video Lottery Funds.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$137,819	\$0	\$143,626
Contractual Services	\$0	\$3,000	\$0	\$4,374
Materials & Supplies	\$0	\$34,030	\$0	\$32,005
Internal Services	\$0	\$8,949	\$0	\$10,016
Total GF/non-GF	\$0	\$183,798	\$0	\$190,021
Program Total:	\$183,798		\$190,021	
Program FTE	0.00	1.00	0.00	1.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is funded with State Video Lottery dollars.

Significant Program Changes

Last Year this program was: FY 2018: 72011 FRM Economic Development

The County's annual payments to Prosper Portland in support of the six Neighborhood Prosperity Initiative districts has been moved to Program# 10027 in the Nondepartmental budget.

Department: County Management **Program Contact:** Eric Arellano
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Fiscal Compliance unit performs pre-award risk assessments, site reviews and financial statement analyses on County human service contracts in order to maintain compliance with Federal, State and County laws and regulations and to provide fiscal oversight of contracted programs. The unit manages the County's annual Single Audit (audit of the County's federal expenditures) and provides countywide grant management policy development, guidance, and support to County departments.

Program Summary

Fiscal Compliance is responsible for administering Countywide grant compliance oversight and performing subrecipient monitoring for all County human services contracts to ensure compliance with Federal and State requirements. In fiscal year 2017, the County received \$62 million in Federal grant funding of which \$18 million was passed-thru to subrecipients.

Fiscal Compliance performs annual risk assessments (which includes a financial statement review) on all contracts receiving Federal funds to ensure compliance with external standards/regulations and assesses the entities financial health. In the most recent year, Fiscal Compliance performed 47 risk assessments. Fiscal Compliance performed 18 site audits covering \$7.2 million in federal expenditures. The performed oversight helps department programmatic staff carry out service delivery by ensuring subrecipients are compliant with grant requirements and are financially stable.

Fiscal Compliance manages and coordinates the annual Single Audit for the County. The program also administers the County's fiscal grants management user group which supports County grants administration, grants policy, and grant compliance efforts.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Total risk assessments performed on County contracts receiving Federal funds	49	50	49	50
Outcome	Percent of total County pass-through dollars actively monitored by Fiscal Compliance	83%	65%	85%	85%

Performance Measures Descriptions

The Fiscal Compliance unit performs financial monitoring of County-funded human service providers. Monitoring includes Federal, State, County and other funds recorded in the pass-through/program support GL account. A higher percentage/count monitored indicates greater coverage and decreased County financial risk as it relates to human services providers.

Legal / Contractual Obligation

The Office of Management and Budget (OMB) Federal Register requires entities expending Federal funds over \$750,000 in a fiscal year to have a single audit of Federal awards. Also, according to the Federal Register, Federal funds that are passed on to other organizations (such as non-profits) must perform subrecipient monitoring on those contracts funded with pass-through dollars. The Federal Register requires organizations to publish an approved indirect cost allocation plan for any indirect or administrative costs allocated to Federal awards.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$349,401	\$0	\$382,893	\$0
Materials & Supplies	\$6,850	\$0	\$3,380	\$0
Total GF/non-GF	\$356,251	\$0	\$386,273	\$0
Program Total:	\$356,251		\$386,273	
Program FTE	3.00	0.00	3.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72012 FRM Fiscal Compliance

Department: County Management **Program Contact:** Peggidy Yates
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The purpose of the Capital Assets Strategic Planning Program is to establish and guide the county's Strategic Capital Plan including the investment in Transportation, Facilities and Property Management and Information Technology assets. The long term strategic capital plan provides the ability to evaluate and prioritize infrastructure investments based upon the County's needs, values, debt capacity and financial ability. In addition, it provides the critical framework for long term asset management of existing infrastructure.

Program Summary

To ensure the effective management of capital assets, the Government Finance Officers Association (GFOA) recommends that local governments prepare long term capital plans outlining major infrastructure investments and forecasting the impact on operating budgets. The Capital Financing and Planning Audit prepared by the Multnomah County Auditor identified this as a need within Multnomah County and called for a coordinated process that included the Chief Financial Officer and the Budget Director.

The Capital Assets Strategic Planning Program was created to establish a county-wide approach to capital asset planning and management.

The program works in conjunction with the Transportation, Facilities and Information Technology to provide a 15-20 year capital asset strategic plan that addresses the infrastructure needs across the portfolio. The capital asset strategic plan that identifies the infrastructure needs and address the County's capacity to meet the needs based upon the organization's debt, financial and operating capacity. The Capital Planning Director, in conjunction with key stakeholders, oversees the planning process, develops the annual capital budget, tracks asset performance and recommends long range capital investment strategies that align with the Strategic Capital Plan.

Critical stakeholders in the planning process includes the Board of County Commissioners, Chief Operating Officer, Chief Financial Officer, Budget Director, Director of the Department of Community Services and Director of the Department of County Asset. The Program Director works in coordination with the Chief Financial Officer and the Budget Director to ensure the strategic plan aligns with the investment needs, general fund forecast, debt obligations and County values and priorities. The Program Director also manages, coordinates and directs the efforts of the Capital Planning Steering Committee and the Capital Planning Technical Team on issues of capital policy and procedures.

This program is located in the Department of County Management and reports directly to the Chief Operating Officer.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Infrastructure Need Report	N/A	1	1	0
Outcome	Percent of future infrastructure needs accurately identified	N/A	100%	100%	100%
Output	Development of long-range strategic capital management plan	1	1	1	1
Output	Annual report on capital planning program presented to the Board of County Commissioners	N/A	1	0	1

Performance Measures Descriptions

The Capital Assets Strategic Planning Program was a new program offer in FY 2016. First year milestones include the hiring of a capital planning director, formation of a capital planning steering committee charter and a scaled implementation plan. The Board approved the Strategic Capital Planning Framework in October of 2017 and the Capital and Asset Management Model was developed in FY 2018.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$215,060	\$0	\$230,071	\$0
Contractual Services	\$155,914	\$0	\$30,000	\$0
Materials & Supplies	\$8,520	\$0	\$6,030	\$0
Internal Services	\$25,045	\$0	\$13,475	\$0
Total GF/non-GF	\$404,539	\$0	\$279,576	\$0
Program Total:	\$404,539		\$279,576	
Program FTE	1.00	0.00	1.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by county General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72013 Capital Assets Strategic Planning

Department: County Management

Program Contact: Anna Plumb

Program Offer Type: Support

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Evaluation and Research Unit (ERU) performs program evaluation and research on workforce equity, operational effectiveness, and business intelligence both countywide and within the Department of County Management. The ERU monitors and analyzes key metrics of countywide organizational health, including workforce equity; evaluates the effectiveness of countywide initiatives; regularly consults countywide on research and evaluation practice; and works with system partners to evaluate cross-departmental county programs.

Program Summary

The Evaluation and Research Unit performs program evaluation and research on workforce equity, operational effectiveness, and business intelligence both countywide and within the Department of County Management. The ERU currently monitors and analyzes key metrics of countywide organizational health, including workforce equity and employee experience; evaluates the effectiveness of countywide initiatives; regularly consults countywide on research and evaluation practice, and works with system partners to evaluate cross-departmental county programs, including a partnership with the Joint Office of Homeless Services (JOHS) to design and implement evaluation(s) of the A Home for Everyone project to end homelessness in the region.

In FY 2018 the ERU completed and presented a review of countywide workforce analytics and workforce equity; partnered with the Office of Diversity and Equity on a project to better understand the experiences and needs of employees with disabilities, issued and analyzed the biannual countywide employee survey of up to 6000 employees; and, in partnership with JOHS, analyzed homeless services spending across the region from FY 2014 to FY 2018. In FY 2019 the ERU will: perform follow-up research on workforce equity issues identified in employee survey and workforce analytics reports; perform a countywide pay equity analysis in accordance with state law; continue to partner with the JOHS on evaluation(s) of efforts to reduce homelessness in the region; perform research and evaluation for the Department of County Management; respond to information requests from county leadership; and consult countywide on program evaluation, analytical methods, and data visualization to assist departments in developing internal research and evaluation capacity. Examples of recent consulting projects include assisting public safety partners in identifying and tracking project goals via a Dashboard, working with Employee Resource Groups to gather workforce equity data, and assisting County leadership in procuring and managing evaluation consultants for high-priority projects.

The ERU will also continue to sponsor and manage a countywide Community of Practice for county research and evaluation staff that the ERU founded in FY 2017.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of reports, presentations, and dashboards issued	53	50	55	55
Outcome	Response rate to the Countywide Employee Survey	59%	59%	58%	58%
Outcome	Percent of information and consulting requests responded to within a week.	N/A	100%	100%	100%
Output	Number of events for the countywide Community of Practice for Program Evaluation and Research	N/A	6	5	5

Performance Measures Descriptions

Total number of responses to the 2017 employee survey were slightly lower than the previous survey, and a higher number of employees resulted in a lower response rate.

The Community of Practice organizing group decided to reduce # of events to 5 to avoid budget and holiday times.

Response to an information or consulting request is defined as initial acknowledgement and arrangement of a planning conversation.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$402,135	\$0	\$433,696	\$0
Materials & Supplies	\$36,129	\$0	\$20,390	\$0
Total GF/non-GF	\$438,264	\$0	\$454,086	\$0
Program Total:	\$438,264		\$454,086	
Program FTE	3.00	0.00	3.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Significant Program Changes

Last Year this program was: FY 2018: 72014 Evaluation and Research Unit

Department: County Management

Program Contact: Travis Graves

Program Offer Type: Support

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Department of County Management (DCM) Business Services Program provides business services to the Department through exercising sound, accurate and transparent financial management. The Program coordinates development of the Department Budget, performs financial functions of accounts receivable, accounts payable, grant accounting, procurement and contracting and provides administrative and general accounting support to the Department.

Program Summary

The Department of County Management (DCM) Business Services Program is responsible for coordination and development of a balanced budget that meets Oregon Budget Law, County policies, and the accounting practices established by the County's Chief Financial Officer. Business Services ensures that the Department's budget adequately supports operations and aligns with the programs authorized by the Board of County Commissioners.

Business Services is responsible for developing the annual DCM budget through collaboration with department programs; for monitoring, analysis, tracking, and financial reporting throughout the fiscal year; for administration of the budget, including position control, adjustments, amendments and modifications; and for tracking and monitoring various revenue streams. Business Services continually monitors departmental spending throughout the budget cycles to ensure spending within designated spending limits.

Business Services is responsible for grant accounting, accounts receivable, accounts payable, travel and training arranging and reconciliations, mileage reimbursements, procurement card management, timekeeping, general accounting and administrative support. The program is responsible for consultation, oversight and delivery of the procurement and purchasing of goods and services in support of DCM operations, as well as a variety of County-wide contracts and Intergovernmental Agreements. The contracts team provides consultation, procurement development, contract development, negotiation, risk assessment and management, supplier/vendor management and ongoing contract administration.

Business Services ensures compliance with applicable financial policies, accounting standards and practices, and further ensures contracts meet County Attorney standards and provide legal authority to procure goods and services. Business Services collaborates with departmental partners in the review of Administrative Procedures, policies and the implementation of best practices; and participates in cross-county teams such as the Finance Managers Forum, Purchasing Advisory Council, Purchasing Leaders Councils, Strategic Sourcing Council, and Finance Users Group.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	# of Accounts Receivable Transactions processed	3,486	3,600	3,600	3,600
Outcome	Percentage of Contracts processed following established policies and processes	100%	100%	100%	100%
Outcome	% of travel and training events reconciled within 30 days of travel return date	83%	90%	90%	90%
Outcome	% of Accounts Payable invoices paid in 30 days or less	98%	90%	98%	98%

Performance Measures Descriptions

Outcomes tracking the percentages of contracts issued under established processes, of accounts payable invoices paid within 30 days, and travel & training reconciled within 30 days, demonstrates adequate controls and processes are in place to ensure compliance with county policies and best practices. Actual results for Travel & Training dependent upon various factors impacting ability to complete reconciliations within prescribed timelines.

Legal / Contractual Obligation

Oregon Budget Law (ORS Chapter 294), federal Office of Management & Budget circulars A-133 and A-87, Government Accounting Standards Board statements and pronouncements, County Administrative Procedures. Oregon Revised Statutes (ORS) 279A, 279B, and 279C establish requirements affecting the County's procurement and contracting practices. The County Public Contract Review Board (PCRB) Rules and Administrative Procedures CON-1 and PUR-1 define procurement and contracting processes within the constraints of ORS requirements. DCM Contracts utilizing cooperative agreements must adhere to state and federal laws governing the use of the cooperative agreements as described therein.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$933,920	\$0	\$1,029,964	\$0
Materials & Supplies	\$33,445	\$0	\$33,555	\$0
Internal Services	\$127,577	\$0	\$116,335	\$0
Total GF/non-GF	\$1,094,942	\$0	\$1,179,854	\$0
Program Total:	\$1,094,942		\$1,179,854	
Program FTE	8.50	0.00	8.50	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Significant Program Changes

Last Year this program was: FY 2018: 72015 DCM Business Services

Department: County Management

Program Contact: Travis Graves

Program Offer Type: Administration

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

Central Human Resources (HR) Administration provides strategic leadership and partnership to department HR units to guide consistent, efficient, and cost effective HR practices across the County organization. It also provides administrative and business services management for Central HR programs, including Labor Relations; Classification and Compensation; Talent Development; Employee Benefits and Wellness; and the Unemployment Insurance Program.

Program Summary

Central HR Administration sets direction, determines policy, develops process structures, and builds relationships to develop and sustain a diverse, talented workforce necessary to achieve results across the organization. Central HR Administration focuses on facilitating communication linkages, ensuring stakeholder input and engaging in collaborative problem resolution to achieve results. The Chief Human Resources Officer is the primary liaison to senior leaders to ensure HR processes are aligned with countywide business goals and oversees evaluation of HR contributions to organizational effectiveness.

Central HR administration oversees countywide program integration and performance measurement; leads HR technology development and process automation; provides budget and financial management; implements employee recognition programs; and ensures compliance with federal, state, local laws, rules, regulations and labor agreements.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of countywide job applications received.	22,181	25,000	22,000	22,000
Outcome	Percentage of employees indicating that they are fully engaged in their jobs	90%	91%	90%	90%

Performance Measures Descriptions

Output: The number of countywide job applications measures the number of applicants interested in county employment. This number declined, as expected, as a result of recruitment optimization projects. Outcome: Percent of respondents that "agree" or "strongly agree" to the question "I am fully engaged in my job" on the bi-annual Countywide Employee Survey. Result was 90% in FY 2017, lower than estimate by 1%. Measure will update in FY 2019.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, and other employment related issues. Eleven labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$876,977	\$0	\$755,240	\$0
Contractual Services	\$45,106	\$0	\$54,482	\$0
Materials & Supplies	\$64,830	\$0	\$64,830	\$0
Internal Services	\$619,912	\$0	\$652,575	\$0
Total GF/non-GF	\$1,606,825	\$0	\$1,527,127	\$0
Program Total:	\$1,606,825		\$1,527,127	
Program FTE	5.63	0.00	4.63	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72016 Central HR Administration

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Central Human Resources, including Classification and Compensation and Talent Development teams, provides systems and tools to attract, train, and retain a diverse, highly qualified workforce. Classification and Compensation provides pay and classification structures necessary for the County to offer competitive pay and appealing career paths. Talent Development coordinates training for employees, provides management/ supervisory coaching, partners with the Office of Diversity and Equity on implementing the Equity and Empowerment Lens and leads organizational development activities.

Program Summary

Central HR Services implements strategies to address key components of the countywide Human Resources Strategic Plan. That plan aims to attract and select diverse, high-performing employees; establish employee retention strategies that support the organization’s job market competitiveness; implement programs to strengthen skills and build knowledge necessary for an effective, culturally competent workforce; and formalize an employee performance management system that fosters individual growth and accountability, aligning performance goals with business requirements.

Classification and Compensation provides the pay and job classification frameworks that facilitate external competitiveness, ensure internal equity, promote employee retention and support career growth. The team identifies and analyzes job duties and qualifications that define the scope and complexity of work performed. It also researches labor market pay range data for the most accurate indicator of prevailing wages and salaries for comparable jobs.

Talent Development provides or coordinates all countywide training classes including: employee, management and supervisory skill development, including the Multnomah Leadership Academy; diversity awareness and skills building; partnering with the Office of Diversity and Equity for the countywide implementation of the Equity and Empowerment Lens; technology training; and quality improvement activities (such as strategic planning and LEAN/Six Sigma).

Talent Development also develops training options by using data from employees’ needs surveys, consulting with senior leadership, aligning with key trends and best practices in training and organizational development and responding to urgent emerging needs. This comprehensive system is essential to create a thriving learning organization, build opportunities for professional growth and support the achievement of organizational program goals.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Percent of employee who indicated training was interesting and relevant.	96.04%	95%	95%	95%
Outcome	Percent of total positions reclassified, revised, updated.	20.2%	10.1%	17.3%	15.7%
Output	Number of Countywide training class attendees.	5,082	6,000	5,000	5,000

Performance Measures Descriptions

Output: Employees evaluate the applicability of the training they receive to their job duties. Outcome: Positions studied, reclassified, revised, or updated as a result of classification or compensation review indicates better alignment to job market factors; technology changes, regulatory requirements and the inability to fill vacancies and/or impact on essential public services. Output: The number of employees taking Talent Development classroom training (decreasing), does not include e-learning (increasing).

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Eleven labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$1,580,954	\$0	\$1,544,272	\$0
Contractual Services	\$140,000	\$0	\$135,000	\$0
Materials & Supplies	\$63,700	\$0	\$58,700	\$0
Internal Services	\$90,637	\$0	\$102,377	\$0
Total GF/non-GF	\$1,875,291	\$0	\$1,840,349	\$0
Program Total:	\$1,875,291		\$1,840,349	
Program FTE	10.60	0.00	10.00	0.00

Program Revenues				
Service Charges	\$25,000	\$0	\$25,000	\$0
Total Revenue	\$25,000	\$0	\$25,000	\$0

Explanation of Revenues

This program is supported by General Fund revenues. For training events that require administration of certain tools or tests or provide professional certifications outside the usual scope of countywide training, a portion of the cost of attendance will be charged back to the cost center of the employee attendee, for an aggregate total of \$25,000 for FY 2017.

Significant Program Changes

Last Year this program was: FY 2018: 72017 Central HR Services

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Labor Relations provides leadership to ensure effective labor-management relationships, appropriate work conditions and legal compliance that balance the rights of employees with the business needs of the County. This program manages 11 labor contracts, representing 85% of the County workforce, and the Personnel Rule (work rules) that apply to all 100%.

Program Summary

Contract negotiations present one of the most significant opportunities to forge partnerships with labor unions that serve the needs of both the County and its employees. Labor Relations was successful during previous negotiations to achieve staggered dates for contract renewals, which provides the County a better opportunity to strategically plan and time proposals for contract changes. While this approach means contract negotiations have become a year round workload, it does better support Labor Relations and department management staff to focus and prepare for each labor agreement.

Forums such as Employee Relations Committee and Employee Benefits Advisory Team along with tools such as negotiated memorandum create the foundation of open communication, clear and accessible decision making and collaborative problem solving needed to achieve uniform labor/management practices throughout the County.

Labor Relations:

- Leads collective bargaining activities, including contract negotiations, interim negotiations, labor contract administration and interpretation.
- Guides development of employee relations programs to create and promote a positive organizational culture, and advocate for fair, respectful treatment of employees.
- Ensures consistent application and enforcement of collective bargaining agreements, work rules, grievance and discipline policies.
- Provides internal expertise for dispute resolution, grievance handling, and cooperative problem-solving.
- Maintains and develops personnel rules and administers the County's drug and alcohol testing process.
- Coordinates countywide layoff activities and the merit council appeals process.
- Manages the Unemployment Claims process; and
- Ensures compliance with federal, state, local laws, rules, regulations and labor agreements, and communicates, trains and coaches supervisors, managers and department human resources units on these requirements

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Labor disputes.	110	113	86	102
Outcome	Percentage of labor disputes settled collaboratively.	95%	93%	98%	96%

Performance Measures Descriptions

Output and Outcome: Disputes include formal and informal disagreements about the interpretation or application of labor contracts, Personnel Rules, practices or policies. Resolving labor disputes collaboratively means all involved parties have agreed to the resolution without going to arbitration. Arbitration can be costly and result in a binding decision that is not in the County's best interest.

Legal / Contractual Obligation

Eleven labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits, and other matters pertaining to employment. Federal, State, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Reemployment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$810,800	\$49,688	\$1,067,970	\$51,718
Contractual Services	\$7,000	\$0	\$7,000	\$0
Materials & Supplies	\$15,850	\$0	\$15,850	\$0
Internal Services	\$3,114	\$5,175	\$5,047	\$10,865
Total GF/non-GF	\$836,764	\$54,863	\$1,095,867	\$62,583
Program Total:	\$891,627		\$1,158,450	
Program FTE	4.60	0.25	5.60	0.25

Program Revenues				
Other / Miscellaneous	\$0	\$54,863	\$0	\$54,863
Total Revenue	\$0	\$54,863	\$0	\$54,863

Explanation of Revenues

This program is supported primarily by General Fund with 0.25 FTE Labor Relations Manager supported by the Risk Fund.

Significant Program Changes

Last Year this program was: FY 2018: 72018 Central HR Labor Relations

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Unemployment Insurance Program provides unemployment benefits to eligible workers who are unemployed due to layoff or other discharge for reasons other than misconduct. Unemployment insurance replaces part of the income that employees lose when they become unemployed.

Program Summary

The Unemployment Insurance Program ensures eligible workers secure financial assistance. The program provides accurate and timely monitoring and reporting, and participates in all hearings to decrease costs and liability due to fraudulent claims. A benefits claim decision will typically favor the applicant if reports are late, data is inaccurate or an employer fails to respond to requested clarification.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of employee claims for unemployment.	253	352	306	286
Outcome	Percentage of unemployment claim appeals found in the County's favor.	67%	60%	50%	60%
Output	Number of unemployment appeals.	6	7	4	5

Performance Measures Descriptions

Outputs and Outcomes: It is the County's goal to support maximum unemployment benefit claims for eligible applicants and minimize fraudulent claims. A higher percentage of claims appealed and subsequently found in the County's favor means a lower expense and lower risk to the County.

Legal / Contractual Obligation

Unemployment Insurance benefits are mandated by federal and state laws. Oregon Employment Law, statues 657.005 and 657.010, Federal Unemployment Act Social Security Act.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$33,770	\$0	\$36,120
Materials & Supplies	\$0	\$971,071	\$0	\$971,071
Total GF/non-GF	\$0	\$1,004,841	\$0	\$1,007,191
Program Total:	\$1,004,841		\$1,007,191	
Program FTE	0.00	0.15	0.00	0.15

Program Revenues				
Other / Miscellaneous	\$0	\$1,004,841	\$0	\$1,004,841
Total Revenue	\$0	\$1,004,841	\$0	\$1,004,841

Explanation of Revenues

This program is supported by the Risk Fund. Unemployment claims are funded by assessing a rate based on 0.25% of monthly payroll for each department.

Significant Program Changes

Last Year this program was: FY 2018: 72019 Central HR Unemployment

The Unemployment Insurance benefits estimate for FY 2017 is based on 0.25% of total personnel costs. This has increased the estimate of benefits for next year by over \$50,000.

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Employee Benefits Program provides comprehensive health coverage, basic and supplemental life insurance options, health, dependent care and transportation spending accounts, leave management and short/long term disability benefits for approximately 12,500 eligible individuals, including employees, spouses or domestic partners, dependent children and retirees. The program includes a Wellness component, which promotes and supports a healthier workforce, serving employees and families by providing a wide variety of activities, education and services to promote well-being.

Program Summary

Internal administration of the Benefit Programs supports the County's unique business, labor and financial requirements, while providing sound fiscal management of the offered plans to obtain the best benefit value for employees and the organization. The highly trained professional staff oversee administration of a complex array of benefit plans ensuring the County remains compliant with labor contracts, federal, state and local laws and mandates.

The Benefits Program consults and coordinates with all County employees and departments to ensure timely enrollment in benefit plans, complete accurate payroll deductions, produce user friendly benefit communication/educational materials, and act as an effective liaison between employees and benefit providers to facilitate problem resolution. The program works closely with County labor and management to structure benefit components that provide desirable benefit options within budgetary constraints.

Wellness programs can help reduce employee absenteeism and health plan costs, while enhancing employee retention, morale, and productivity. The Employee Wellness Program serves the specific health needs of our employees as documented by health plan claims, population health data, and employee input. The Wellness Program focuses on chronic disease prevention and management through programs and policies that support healthy eating, physical activity, weight control, stress management, resiliency and overall health and well-being. Health plan partnerships and resources supplement program efforts.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Medical plan annual member count	12,000	12,500	12,400	12,500
Outcome	Participation in County Wellness Programs	8314	n/a	9900	10,150
Efficiency	County's monthly per employee benefit cost (increase)	7.0%	6.0%	5.0%	6.0%

Performance Measures Descriptions

Output: Total number of members enrolled in health plan coverage during the plan year. This includes employees, retirees, COBRA participants and dependents from all. Outcome: This totals the participation across all Wellness offerings in which some report unique participants and others report number of engagements by participants (not unique). Efficiency: Actual dollar costs per National average health benefit increase has been 6.0%, and is expected to increase in 2019 by 6.0%.

Legal / Contractual Obligation

County labor contracts contain benefit mandates for active and retired members. Benefits are governed by a variety of federal/state/local laws and agencies, including Internal Revenue Service (IRS), Dept of Labor (DOL), Dept of Health and Human Services (HHS), COBRA, Working Families Tax Relief Act, Older Workers Benefit Protection Act, Genetic Information Nondiscrimination Act (GINA), HIPAA, Patient Protection and Affordable Care Act (PPACA), CHIP, as well as civil rights and EEO laws. Labor contracts require a transit pass be provided by employer. OAR Chapter 340, Div 242 requires employers to provide commute options to achieve and maintain a reduced auto trip rate. To meet this requirement, County assists DEQ with their bi-annual survey to determine current commute methods, then follows DEQ approved plan to meet target reductions.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$3,096,558	\$0	\$3,060,711
Contractual Services	\$0	\$1,478,962	\$0	\$1,389,052
Materials & Supplies	\$0	\$97,532,236	\$0	\$107,248,636
Internal Services	\$0	\$409,057	\$0	\$448,005
Total GF/non-GF	\$0	\$102,516,813	\$0	\$112,146,404
Program Total:	\$102,516,813		\$112,146,404	
Program FTE	0.00	14.12	0.00	14.12

Program Revenues				
Other / Miscellaneous	\$0	\$102,480,213	\$0	\$112,190,140
Service Charges	\$0	\$20,400	\$0	\$20,400
Total Revenue	\$0	\$102,500,613	\$0	\$112,210,540

Explanation of Revenues

Sources of revenue are: departmental contributions for health plan coverage (\$86,578,677 actives/\$7,079,497 Retirees), Short and Long Term Disability and Life Insurance (\$2,891,062); benefit administration charge, (\$4,240,224), employee payroll deductions (both pre- and post- tax) for benefit plan participation (\$5,161,848), premium payments from retirees and COBRA participants (\$5,828,832), and operational refunds/forfeitures/rebates/performance guarantee penalties from vendors (\$410,000).

Significant Program Changes

Last Year this program was: FY 2018: 72020 Central HR Employee Benefits

Wellness Outcome measurement changed from number of participants in various wellness campaigns, to number of unique participants (fitness centers, fitness classes, flu shots, campaigns, etc.) and number of engagements with Wellness Program offerings.

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

This new program is recommended by Deloitte given the size and complexity of our Workday implementation. Workday is the enterprise resource planning system (ERP) to be implemented countywide in January 2019. Unlike older ERP systems, Workday is designed to be managed and supported by the business operational staff (e.g., human resources and finance). This offer funds the program for the last half of FY19 post system go-live. The Workday Management Support Team provides strategic and operational leadership and manages the roll out of future product functionality.

Program Summary

The Workday Management Team supports finance, HCM and payroll operational and strategic functions in Workday including project management, business analysis, configuration, reporting and daily maintenance across the multiple disciplines. For finance, the team supports Workday functions including grants management, financial accounting,, customer accounts (accounts receivable), business assets, banking & settlement, project accounting, supplier accounts (accounts payable), procurement, and inventory. For HCM and payroll the team supports Workday functions including maintenance of jobs architecture, payroll, compensation, talent, recruiting, core HR, time, absence, benefits and learning. The Workday Management Team will perform the following functions:

1. System configuration related to new functionality or changes to existing system build.
2. Manage system business processes, determine the methodologies for implementing and maintaining finance, HCM and payroll systems, business processes and procedures to achieve a consistent and predictable employee and manager experience across the county.
3. Conduct audits, analyzing data, and performing testing to protect data integrity.
4. Meet regularly with stakeholder groups to share new functionality in upcoming Workday releases and determine how to better meet business needs.
5. Write reports and maintain existing reports that may require modifications following scheduled Workday upgrades.
6. Use audit reports to inform how to improve HR and finance users, managers, employees, and other stakeholders' experience.
7. Assist with training on new functionality following upgrades. Coordinating with Talent Development to create a change and training plan to enhance skill development and adoption for system end users.
8. Manage business relationship with Workday.
9. Work collaboratively with Information Technology staff on technical issues and solutions.
10. Provide analysis support for human resource data associated with the Workforce Equity Initiative

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Percentage of business processes that have been cancelled, corrected, and rescinded				50%
Outcome	Percentage of custom (post go-live) Workday reports created/tested.				75%
Efficiency	Percentage of business processes initiated through employee and manager self service				50%

Performance Measures Descriptions

Output Measure 1 is the effectiveness of the Workday Management Team's Tier III support to Functional teams. We expect this number to decrease over time. Outcome Measure 2 is the required percentage of post go-live finance reports that have been identified (others will continue to be added). Efficiency Measure 3 is the effectiveness of change management and organizational adaptation to the new system. We expect this number to increase over time.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$0	\$0	\$1,019,188
Contractual Services	\$0	\$0	\$0	\$57,500
Materials & Supplies	\$0	\$0	\$0	\$74,380
Internal Services	\$0	\$0	\$0	\$1,000
Total GF/non-GF	\$0	\$0	\$0	\$1,152,068
Program Total:	\$0		\$1,152,068	
Program FTE	0.00	0.00	0.00	6.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

ERP Project Fund 2513 Revenues

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Rick Teague
Program Offer Type: Administration **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

DART Administration plans, directs, and coordinates operations and activities of the County's Division of Assessment, Recording and Taxation; performs state mandated functions of the Assessor, Tax Collector, and certain County Clerk functions; monitors activities for statutory compliance; establishes effective implementation of policies, strategic direction, program evaluation, and process/technology improvements; provides financial and tactical resource planning and employee development and performance management.

Program Summary

DART performs the duties of the County Assessor including property valuation and assessment, property tax rate/levy calculation, certifying the property tax roll for collection, ownership and records management, and mapping. It is responsible for maintaining Real Market Value on over 345,000 real and personal property accounts, and capturing and calculating Measure 50 "exception value" defined as new construction, renovation or remodeling, which increases total Assessed Value of taxing districts. DART performs the duties of the Tax Collector who certifies the billing, collecting, and distribution of over \$1.7 billion in property taxes; and the County Clerk functions of document recording, marriage licenses and domestic partnership registrations, and administration of the Board of Property Tax Appeals.

The administration program plans, directs and coordinates the operations and activities of Multnomah County's Division of Assessment, Recording and Taxation. Administration is responsible for strategic direction and tactical planning; policy development and implementation; financial planning and budget development; employee development, training, succession planning and performance management; continuity of operations planning; technology and information systems which includes a new Assessment and Taxation System; quality control, program measurement and evaluation and process improvements; administrative support, communications, including the news media, and oversight of over 500,000 customer service interactions annually.

The program supports and provides leadership that ensures all property is valued accurately and taxed fairly as required by the Oregon State Constitution, Oregon Revised Statutes and Oregon Dept of Revenue Administrative Rules, monitors division activities and processes for statutory compliance, and submits required compliance reports to the Oregon Dept of Revenue. This program ensures the collection of property taxes in a timely manner that is fair and equitable to all taxpayers and maintains accurate, accessible property ownership records and property descriptions that are used in the production of county property tax maps. The program provides quality customer service to taxpayers. DART has taken steps toward achieving Climate Action Plan Item #18-8 Local Government Operations, by increasing use of e-files and e-business, and participation in waste recycling efforts, leading to an overall reduction in paper use and paper waste and contributing to a reduced facilities footprint.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Total Number of Property Tax Accounts Administered	344,065	346,500	335,500	336,500
Outcome	Percent Acceptable Compliance Reports Required by Oregon Department of Revenue	100%	100%	100%	100%
Efficiency	Administrative Costs as a Percent of Actual Expenditures	6%	6.5%	6.00%	6.00%
Efficiency	Cost of Collection per Account (in Dollars)	\$4.00	\$4.00	\$4.00	\$4.00

Performance Measures Descriptions

The percent of required compliance reports received and accepted by the Dept of Revenue (CAFFA Grant Document, Appraisal Plan, Sales Ratio Study) implies adequacy of DART operations and uniform taxation. The goal is to maintain administrative costs at 6-7% of total DART operating program expenditures. The cost of collection per account will fluctuate depending on costs of collection activities and the number of accounts.

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305-312 and 321. Additionally, ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept 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 is already at the minimally acceptable staffing level to perform their functions. Any reduction to this program may jeopardize the grant revenue.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$449,672	\$0	\$542,621	\$0
Contractual Services	\$5,000	\$0	\$5,000	\$0
Materials & Supplies	\$178,850	\$0	\$180,590	\$0
Internal Services	\$87,795	\$0	\$87,198	\$0
Total GF/non-GF	\$721,317	\$0	\$815,409	\$0
Program Total:	\$721,317		\$815,409	
Program FTE	3.30	0.00	3.80	0.00

Program Revenues				
Fees, Permits & Charges	\$78,500	\$0	\$80,000	\$0
Intergovernmental	\$102,170	\$0	\$119,956	\$0
Service Charges	\$20,000	\$0	\$20,000	\$0
Total Revenue	\$200,670	\$0	\$219,956	\$0

Explanation of Revenues

Participation in the Oregon Dept of Revenue's County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 21% of program expenditures. Grant amounts can vary depending upon the overall statewide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total share of CAFFA is estimated at \$3,808,154, with \$119,956 allocated to DART Administration. General Fund Revenue of \$80,000 is from a portion of the document recording fee for County Assessment and Taxation Programs (5% of the \$10 per document fee) and is for the maintenance of county property tax systems. The document recording fee may vary annually based upon economic factors affecting the real estate market and the number of documents recorded. (Note: The balance of the \$10 document recording fee is allocated to the County Clerk (5%) and to the County Assessment & Taxation Fund (90%) for distribution to the Oregon Dept of Revenue for deposit into the statewide CAFFA Account.) Remaining program support is from General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72023 Div of Assessment, Recording & Taxation Administration

Transferred .50 FTE from Program 72038 DART Tax Title to Program 72023 Div of Assessment, Recording & Taxation Administration for FY2019

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	2018	2018	2019	2019
Personnel	\$760,301	\$0	\$774,606	\$0
Materials & Supplies	\$16,454	\$0	\$17,124	\$0
Internal Services	\$259,598	\$0	\$431,560	\$0
Total GF/non-GF	\$1,036,353	\$0	\$1,223,290	\$0
Program Total:	\$1,036,353		\$1,223,290	
Program FTE	9.10	0.00	9.10	0.00

Program Revenues				
Intergovernmental	\$281,246	\$0	\$287,516	\$0
Total Revenue	\$281,246	\$0	\$287,516	\$0

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 \$3,808,154, with \$287,516 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 2018: 72024 DART Customer Service

The increases in Performance Measure #3, Number of phone calls received and answered, for FY 2018 Estimate and FY 2019 Offer is a result of our including on line Chat conversations in our estimates. On line Chats are becoming an increasing part of our communication with customers.

Department: County Management **Program Contact:** Rick Teague
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The County Clerk Functions program consists of recording land related and other legal documents, issuance of Marriage Licenses and Domestic Partnership Registrations, acceptance of Passport Applications, creation and maintenance of permanent records, issuance of certified copies, and administration of the Board of Property Tax Appeals (BoPTA). BoPTA is responsible for hearing petitions from taxpayers who disagree with their property value. The Board makes decisions to reduce property values or waive personal property late filing fees based on evidence provided by the taxpayer.

Program Summary

Recording is the process of registering legal documents, thus making them a matter of public record. These documents are primarily related to real property transactions. The recording process requires staff to review every document for statutory compliance. The processes for Recording, Marriage Licenses, Domestic Partnership Registrations and Passport Applications include the collection of statutory fees. With the exception of Passport Applications, the creation and maintenance of general indexes and production of microfilm preserved for permanent retention is a statutory requirement.

For FY 2017, 164,831 documents were recorded, 7,676 Marriage Licenses were processed, 150 Domestic Partnership Registrations were issued and 14,487 Passport Applications were accepted. Last year 590 BoPTA appeals were processed. 8,469 passport photos were taken. All areas within the County Clerk Functions program provide direct customer service by responding to telephone, chat and email inquiries and walk-in customers. The Recording staff assist approximately 15,000 customers at the counter annually and respond to an estimated 15,000 inquiries. The Marriage License and Domestic Partnership staff assist approximately 28,000 customers at the counter annually and respond to a high volume of inquiries that are reported within the Customer Service total of approximately 120,000 annually.

This program also makes available records for customer use. Electronic recording functionality was installed in 2012 and additional service providers were added in subsequent years, improving efficiency and customer service. Currently approximately 60% of recording transactions are completed electronically. Over the past three years records were digitized and a new search engine for PC's used by customers was installed. Future plans, pending County Executive approval, include providing digitized records over the internet for public use.

Passport photos were added in 2014 as an additional customer service. Acceptance of debit and credit cards for point of sale transactions was initiated also. In 2015 the Passport photo and County photo ID processes were transferred under supervision of DART Customer Service and relocated to the DART office.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Marriage Licenses Issued	7,676	7,800	7,800	7,800
Outcome	Number of Accurately Processed Licenses	7,600	7,720	7,720	7,720
Output	Number of Documents Recorded	164,824	170,000	170,000	170,000
Outcome	Average Number of Business Days to Return Original Recorded Documents	4	3	4	4

Performance Measures Descriptions

The "Number of Accurately Processed Licenses" is the number of licenses which the State of Oregon (Office of Vital Statistics) reviewed and found to be 100% accurate. The remaining licenses were returned to the county by the state for minor corrections. The "Average Number of Business Days to Return Original Recorded Documents" is a measure of compliance with the statutory requirement that documents be returned within 10 business days.

Legal / Contractual Obligation

The County Clerk functions are governed by Oregon Revised Statutes (ORS) Chapter 205. Multnomah County Ordinance 948 authorizes couples to voluntarily register as domestic partners. Additional statutes pertaining to this program are found in ORS 106, 107, 409, 432 (marriage/state domestic partnerships); ORS 86, 87, 93, 100 (requirements for recording); and ORS 306 and 309 (Board of Property Tax Appeals). Guidelines for the acceptance of Passports are set by the US Department of State. Through the "County Assessment Function Funding Assistance" (CAFFA) Grant process described in ORS 294.175, the Dept of Revenue determines the acceptable level of assessment and taxation staffing; DART is already at the minimally acceptable level to perform their functions. Any reduction to the BoPTA portion of this Program may jeopardize the grant revenue.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$1,159,994	\$0	\$1,196,655	\$0
Contractual Services	\$75,946	\$0	\$75,946	\$0
Materials & Supplies	\$104,444	\$0	\$105,862	\$0
Internal Services	\$289,617	\$0	\$274,388	\$0
Total GF/non-GF	\$1,630,001	\$0	\$1,652,851	\$0
Program Total:	\$1,630,001		\$1,652,851	
Program FTE	13.50	0.00	13.50	0.00

Program Revenues				
Fees, Permits & Charges	\$5,861,800	\$0	\$5,401,200	\$0
Intergovernmental	\$37,153	\$0	\$38,082	\$0
Other / Miscellaneous	\$237,400	\$0	\$237,400	\$0
Total Revenue	\$6,136,353	\$0	\$5,676,682	\$0

Explanation of Revenues

A \$60 fee is collected for each marriage license, State and County Domestic Partnership (DP) registration: \$25 to the County General Fund, \$25 to State Domestic Violence fund (for licenses and State DP), \$25 to County Community and Family Services for domestic violence victims (for County DP), and \$10 to Court Conciliation Services. Estimated fees for marriage licenses, domestic partnerships, marriage record copies, amendments to marriage and DP records, and waivers of 3-day waiting period for a marriage license are \$327,500. Passport application acceptance fees are \$525,000 and Passport photo fees are \$90,000; Document Recording page fees retained by the County General Fund are \$4,315,700. Recording record copy fees are \$237,400. A portion of recording fees collected for the Corner Preservation Fund and the County Assessment Function Funding Account are credited to the County Clerk Fund pursuant to ORS 205.320(2) are projected at \$119,000. Fees for filing a Board of Property Tax (BoPTA) Appeal are estimated at \$24,000. BoPTA is allocated \$38,082 of the \$3,808,154 County Assessment Function Funding Assistance (CAFFA) Grant.

Significant Program Changes

Last Year this program was: FY 2018: 72025A DART County Clerk Functions

Department: County Management **Program Contact:** Rick Teague
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

The County Clerk scaled offer represents a carryover of unspent restricted revenues for the County Clerk that reside within the General Fund. A portion of fees on recorded documents is dedicated for the County Clerks pursuant to Oregon Revised Statute 205.320(2), to acquire storage and retrieval systems and maintain and restore records as authorized by the County Clerk. Carryover funds will be used for services to continue conversion of historical recorded documents and other County Clerk records to digital format for a Digital Research Room, and to maintain County Clerk records and systems.

Program Summary

The County Clerk Functions Program consists of recording land related and other legal documents, issuance of Marriage Licenses and Domestic Partnership Registrations, acceptance of Passport Applications, creation and maintenance of permanent records, issuance of certified copies, and administration of the Board of Property Tax Appeals (BoPTA). BoPTA is responsible for hearing petitions from taxpayers who disagree with their property values or waive personal property late filing fees based on evidence provided by the taxpayer.

The County Clerk Carryover Program for FY 2019 will continue the digitization of a large portion of the County Clerk historical records that are currently in microfiche and microfilm format, as well as some hard copy records, in addition to providing for maintenance of existing county clerk records and systems. In the past, these records have been available to the public in DART's public research room via microfilm and microfiche. Records from 1965 forward are available electronically at public access terminals on site, via the County Clerk Recording system. The digitization of historical records in FY 2019 continues an ongoing records digitization project. By converting records to digital/electronic format, the County is positioned to no longer rely upon antiquated microfilm and microfiche equipment, and to provide for optimal space utilization.

The Program aligns with DART's strategic business plan to provide public access to County Clerk records through the consolidated Customer Service Office, providing public records in an accessible electronic format via a new Digital Research Room implemented during FY 2014. This comprehensive approach provides improved and efficient service delivery for access to public records. The scaled Program Offer utilizes unspent restricted revenues dedicated for the County Clerk that reside within the County General Fund, to continue digitization of County Clerk records, services related to the new Digital Research Room and maintenance of County Clerk records and systems.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of digital records converted and uploaded to Digital Research Room	0	300,000	75,000	150,000
Outcome					

Performance Measures Descriptions

The number of digital records converted and uploaded to the Digital Research Room was a new measure in FY15. Digital images include record index and recorded document images. Since FY2013 we converted and uploaded 3.2 million index and document images for years 1965 through 1993. Staff turnover in 2016 resulted in the project being delayed. We anticipate at budgeted FTE we will be able to convert going forward, 150,000 records annually.

Legal / Contractual Obligation

The County Clerk functions are governed by Oregon Revised Statutes (ORS) Chapter 205. ORS 205.320(2) requires that a portion of the document recording fees be dedicated to a County Clerk Fund established by the County governing body, for the purpose of acquiring records storage and retrieval systems and maintaining and restoring records as authorized by the County Clerk.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$77,511	\$0	\$80,040	\$0
Contractual Services	\$133,489	\$0	\$69,960	\$0
Total GF/non-GF	\$211,000	\$0	\$150,000	\$0
Program Total:	\$211,000		\$150,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Beginning Working Capital	\$211,000	\$0	\$150,000	\$0
Total Revenue	\$211,000	\$0	\$150,000	\$0

Explanation of Revenues

The carryover revenue in this Program, in the amount of \$211,000, represents unspent "restricted revenues", and is a portion of recording fees dedicated to the County Clerk that reside in the General Fund. Under GASB #54, these funds are restricted for purposes described in Oregon Revised Statute 205.320(2).

Significant Program Changes

Last Year this program was: FY 2018: 72025B DART County Clerk Carryover

Department: County Management **Program Contact:** Rick Teague
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

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 records 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 2018 is expected to further increase efficiencies.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Ownership Changes Processed	30,619	31,000	31,000	31,000
Outcome	Average Number of Days to Complete Ownership Changes	2	3	2	2

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	2018	2018	2019	2019
Personnel	\$359,006	\$0	\$374,407	\$0
Contractual Services	\$1,474	\$0	\$1,474	\$0
Materials & Supplies	\$1,450	\$0	\$1,450	\$0
Internal Services	\$72,567	\$0	\$74,487	\$0
Total GF/non-GF	\$434,497	\$0	\$451,818	\$0
Program Total:	\$434,497		\$451,818	
Program FTE	4.20	0.00	4.20	0.00

Program Revenues				
Intergovernmental	\$129,663	\$0	\$132,524	\$0
Total Revenue	\$129,663	\$0	\$132,524	\$0

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 \$3,808,1547. Allocated \$132,524 to DART Ownership program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72026 DART Ownership

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 311 and 312. 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 the staffing level for DART is already at the minimally acceptable level to perform their functions. Any reduction to this program may jeopardize this grant revenue. The County as an agent of the State carries out the functions under ORS 446.566 to ORS 446.646 related to mobile home ownership document transactions and trip permits.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$1,176,123	\$0	\$1,238,263	\$0
Contractual Services	\$182,625	\$0	\$168,775	\$0
Materials & Supplies	\$63,352	\$0	\$68,155	\$0
Internal Services	\$526,338	\$0	\$465,914	\$0
Total GF/non-GF	\$1,948,438	\$0	\$1,941,107	\$0
Program Total:	\$1,948,438		\$1,941,107	
Program FTE	12.00	0.00	12.00	0.00

Program Revenues				
Fees, Permits & Charges	\$368,600	\$0	\$410,000	\$0
Intergovernmental	\$370,784	\$0	\$378,911	\$0
Other / Miscellaneous	\$5,500	\$0	\$5,500	\$0
Total Revenue	\$744,884	\$0	\$794,411	\$0

Explanation of Revenues

Participation in the statewide County Assessment Function Funding Assistance (CAFFA) Grant reimburses approximately 21% of program expenditures. Grant amounts vary depending upon the state-wide CAFFA pool and Multnomah County's allocated percentage. Multnomah County's share is estimated at \$3,808,154, with \$378,911 allocated to DART Tax Revenue Management Program. Program revenues of \$415,500 are service fees required by Oregon Revised Statutes and County Fee Ordinance, are based on historical averages, and include foreclosure publication fees, title search fees, exemption late filing fees, delinquent personal property tax warrant and warrant recording fees, convenience fees, manufactured structure ownership transfer fees and miscellaneous tax collection and copy fees. Remaining Program support is provided by County General Fund revenue.

Significant Program Changes

Last Year this program was: FY 2018: 72027 DART Tax Revenue Management

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 86, 92, 93, 100, 198, 199, 222, 227, 271, 274, 275, 306-308, 312, 368, 457, 477, and 478. Additionally, ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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 staffing is at the minimally acceptable level to perform the A&T function. 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	2018	2018	2019	2019
Personnel	\$868,500	\$0	\$924,319	\$0
Materials & Supplies	\$43,058	\$0	\$43,527	\$0
Internal Services	\$136,996	\$0	\$165,976	\$0
Total GF/non-GF	\$1,048,554	\$0	\$1,133,822	\$0
Program Total:	\$1,048,554		\$1,133,822	
Program FTE	8.30	0.00	8.30	0.00

Program Revenues				
Intergovernmental	\$225,517	\$0	\$262,000	\$0
Total Revenue	\$225,517	\$0	\$262,000	\$0

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 annual share of CAFFA is estimated at \$3,808,154, with \$262,000 allocated to DART GIS Cartography Program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72028 DART GIS/Cartography & Parcel Management

Department: County Management **Program Contact:** Larry Steele
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Assessment Performance Analysis Unit, within the Division of Assessment, Recording and Taxation (DART) is responsible for annual adjustments to Real Market Value resulting in assessed value upon which taxes are calculated and levied for the benefit of all Multnomah County taxing districts. Analysts develop and publish the annual Sales Ratio Study as required by statute.

Program Summary

The Assessment Performance Analysis Unit links to DART appraisal and other programs and their contributions. Appraisal Data Analysts analyze sales, trends and other market data used to monitor, maintain and report valuation performance regarding Residential, Business Personal Property, Commercial, Multi-Family, and Industrial Appraisal Models. The Analysis Unit adjusts Real Market Values of all property in the County and publishes the annual Sales Ratio Study that evaluates and reports the effectiveness of appraisal programs to the Oregon Department of Revenue. The program assists in answering public and media questions about property values, contributing to the public's perception of fairness in assessing and collecting property taxes.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Projects Maintained	17	19	19	19
Outcome	Percentage of Neighborhoods in compliance with State standards.	98%	95%	95%	95%

Performance Measures Descriptions

The output measure called "Number of Projects" refers to the many specific annual studies and reports completed by the team, including the largest: Residential. Performance Measure #2 - outcome.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property tax calculation 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 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	2018	2018	2019	2019
Personnel	\$429,150	\$0	\$318,789	\$0
Materials & Supplies	\$15,732	\$0	\$14,461	\$0
Internal Services	\$52,627	\$0	\$32,819	\$0
Total GF/non-GF	\$497,509	\$0	\$366,069	\$0
Program Total:	\$497,509		\$366,069	
Program FTE	3.30	0.00	2.30	0.00

Program Revenues				
Intergovernmental	\$102,170	\$0	\$72,736	\$0
Total Revenue	\$102,170	\$0	\$72,736	\$0

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. Total annual Multnomah County share of CAFFA is estimated at \$3,808,154, with \$72,736 allocated to DART Assessment Performance Mgmt Program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72029 DART Assessment Performance Analysis

Transferred 1 FTE Sr Data Analyst Position 704480 from Program 72029 Assessment Performance Analysis to Program 72037 Application Support.

Department: County Management **Program Contact:** Jeffrey Brown
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Special Programs Group (SPG), within the Division of Assessment Recording & Taxation (DART), is responsible for processing applications relating to property tax exemptions or special assessments. Exempt properties are monitored by the program for continued qualification. Additional tax roll responsibilities include creating new tax accounts, processing corrections and verifying correct assessed values. Special Programs maintains property information while providing direct customer service to interested parties.

Program Summary

SPG ensures that exempt and specially assessed property is valued in accordance with the law, which maximizes property tax revenues to fund County programs. Property taxes account for approximately 60% of the County's General Fund revenues. Failure to monitor this process will result in loss of taxable assessed value. Focus is on timely processing property descriptions, maintaining ownership and creating new accounts and compliance monitoring of existing exemptions, careful review of new applications, and resolving appeals. Accurate values maximize the level of tax assessment allowed under Measure 5 and Measure 50 tax limitation.

The Special Programs Group (SPG) maintains and processes over 11,000 accounts with special assessments and/or exemptions. Specially assessed properties like historic while exempt accounts include property owned and/or occupied by organizations such as charitable, fraternal, and religious. Leasehold records are monitored to maintain accurate, taxable values on over 800 accounts where non-exempt tenants lease from exempt government agencies. SPG is responsible for approximately 4,000 property tax exemptions for the War Veteran & Surviving Spouse program and the Active Duty Military program. All of these special assessment and exemption programs are mandated by law. In addition, approximately 500 field inspections are performed as part of the program's compliance activities. Staff calculates and redistributes Maximum Assessed Values in accordance with Measure 50 tax limitation requirements for thousands of new properties created each year. SPG contributes to the process to arrive at the total taxable assessed value upon which taxes are calculated and levied for the benefit of all Multnomah County taxing districts. This program ensures that exempt and specially assessed property is accurately assessed as required by the Oregon Revised Statutes (ORS). Maintaining accurate market values on all property relates to the bonding capacity and general obligation bond tax rates for taxing districts in the County.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Accounts Reviewed and Processed for Current Tax Roll	8,248	10,100	10,100	10,100
Outcome	Taxable Market Value Re-established to the Tax Roll (in Millions of dollars)	\$1,104.5	\$650	\$600	\$650
Input	Total Exempt Accounts Monitored	34,308	35,000	34,450	34,500
Output	Total Number of Accounts Processed for Prior Tax Roll	1,565	2,200	2,000	2,000

Performance Measures Descriptions

Oregon Revised Statute (ORS) requires all property to be valued according to market as accurate market values directly relate to the bonding capacity and general obligation bond tax rates for taxing districts. Specific property tax exemptions are allowed by law. Measurements indicate exempt and specially assessed properties are accurately assessed and tax rolls properly maintained. FY 2016 Actual had more than typical number of properties with Historic special assessment expiring and taxable value returning to tax roll. The program was subject to a moratorium the following year.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property tax calculation process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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 is already at the minimally acceptable staffing 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	2018	2018	2019	2019
Personnel	\$986,122	\$0	\$915,099	\$0
Contractual Services	\$1,000	\$0	\$1,000	\$0
Materials & Supplies	\$21,702	\$0	\$19,498	\$0
Internal Services	\$170,146	\$0	\$161,498	\$0
Total GF/non-GF	\$1,178,970	\$0	\$1,097,095	\$0
Program Total:	\$1,178,970		\$1,097,095	
Program FTE	8.40	0.00	8.25	0.00

Program Revenues				
Intergovernmental	\$324,715	\$0	\$260,478	\$0
Total Revenue	\$324,715	\$0	\$260,478	\$0

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 \$3,808,154, with \$260,478 allocated to DART Property Assessment Special Programs. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72030 DART Property Assessment Special Programs

Reduced Temporary Staffing and interns; Changed allocated FTE of Chief Appraiser position.

Department: County Management **Program Contact:** Jeffrey Brown
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Personal Property Assessment Program, within the Division of Assessment, Recording and Taxation (DART), is responsible for valuing all taxable Business Personal Property accounts. Personal Property represents 4% of the value upon which taxes are levied for the benefit of all Multnomah County taxing districts.

Program Summary

This program is responsible for maintaining Real Market Value and Maximum Assessed Value on all taxable Personal Property accounts. Oregon Revised Statutes require annual filings from the 22,500 businesses in the county, comprising more than 34,000 accounts. 30% of those accounts are equipment-leasing companies. Values must be fully recalculated each year to reflect items added or disposed of by businesses and to calculate depreciation influence on remaining assets.

Appraisers perform field inspections and detailed reviews to identify businesses and properties omitted from the assessment roll. Appraisals are performed to defend values under appeal. This program assesses Personal Property accurately and fairly as required by Oregon Revised Statutes (ORS), maximizing property tax revenues to fund programs. Maintaining accurate Real Market Values on all property directly affects the maximum bonding capacity and general obligation bond tax rates for all applicable taxing districts in the County. Property taxes account for approximately 60% of the County's General Fund revenues. Under the Measure 50 tax limitation measure, there is no assumption of a 3% increase in personal property taxable value; instead, each business annually reports existing taxable property. Failure to monitor this process will result in loss of taxable assessed value and tax revenue. The focus is on discovery of new taxable property and resolving value appeals to minimize cost to taxpayers. Various computer and online tools are used to maximize appraisal efforts. Accurate values maximize the level of tax assessment allowed under Measure 5 and Measure 50 tax limitation measures.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Non-Leased Accounts Processed, Coded and Valued	22,229	22,100	22,100	22,200
Outcome	Assessed Value in Millions of Personal Property Value Placed on the Tax Roll	\$2,756	\$2,650	\$2,650	\$2,700
Output	Percentage of Accounts with Captured Asset Listings	76.4%	76%	76%	76%
Output	Percentage of Accounts Filing Electronically	10%	7%	10%	10%

Performance Measures Descriptions

Oregon Revised Statutes require all property appraisals be at 100% of Market Value. Failure to meet standards can result in loss of CAFFA grant revenue and program control. Program measures focus on improving efficiency and technology utilization. We capture annual asset lists from businesses in a database and return them to the business each year for updating. We encourage businesses to file their lists electronically, reducing our costs and improving accuracy.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92,205,294,305,306,307,308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property tax calculation process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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 is already at the minimally acceptable staffing 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	2018	2018	2019	2019
Personnel	\$1,126,756	\$0	\$1,272,909	\$0
Contractual Services	\$10,000	\$0	\$0	\$0
Materials & Supplies	\$13,069	\$0	\$32,210	\$0
Internal Services	\$233,258	\$0	\$268,896	\$0
Total GF/non-GF	\$1,383,083	\$0	\$1,574,015	\$0
Program Total:	\$1,383,083		\$1,574,015	
Program FTE	10.30	0.00	11.25	0.00

Program Revenues				
Intergovernmental	\$318,399	\$0	\$355,301	\$0
Total Revenue	\$318,399	\$0	\$355,301	\$0

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 \$3,808,154, with \$355,301 allocated to DART Personal Property Assessment Program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72031 DART Personal Property Assessment

Moved Property Appraiser 2 position #705241 from Residential Appraisal Program # 72034 to Personal Property Assessment #72031. Changed allocation of Chief Appraiser position.

Department: County Management **Program Contact:** Jeffrey Brown
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Property Assessment-Industrial Program, within the Division of Assessment, Recording and Taxation (DART) is responsible for valuing, appraising and/or maintaining all local and state industrial property and storage and distribution warehouses. Industrial property represents approximately 8% of the total taxable assessed value upon which taxes are calculated and levied for the benefit of all Multnomah County taxing districts.

Program Summary

This program is responsible for maintaining Real Market Value and Maximum Assessed Value on approximately 858 county-responsibility real property industrial properties and maintenance of 427 accounts appraised by the Oregon Department of Revenue. In addition this program is responsible for maintaining Real Market Value and Maximum Assessed Value on 475 billboard accounts. During the 2017 year the appraisal responsibility for approximately 3,000 warehouse and miscellaneous Port of Portland accounts were transferred to the Industrial Appraisal program for better fit. All industrial property owners are required to file industrial property returns annually. A number of industrial plants are physically inspected and audited every year. Appraisers perform appraisals to defend values under appeal. Industrial properties are high-value accounts; loss on appeal can result in large tax refunds paid by taxing jurisdictions with interest. Focus is on proper classification of taxable property and resolving value appeals to minimize cost to taxpayers. Use of various computer and online tools maximize appraisal efforts. This program appraises industrial property accurately and fairly as required by the Oregon Revised Statutes (ORS), maximizing property tax revenues to fund programs. Maintaining accurate Real Market Values on all property directly affects the maximum bonding capacity and general obligation bond tax rates for all applicable taxing districts in the County. Property taxes account for approximately 61% of the County's General Fund revenues. Accurate values maximize the level of tax assessment allowed under Measure 5 and Measure 50 tax limitation measures.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Industrial Accounts Maintained	952	900	4760	5200
Outcome	Assessed Value placed on the Tax Roll (in millions)	\$3,033	\$3,098	\$6,416	\$6,700
Output	Number of Industrial Sites Reviewed	10	30	17	26

Performance Measures Descriptions

Oregon Revised Statutes require property appraisals be at 100% of Market Value each year. Failure to meet standards can result in loss of CAFFA grant revenue and program control. Measures include state and county responsible industrial sites to better reflect the contribution of this program. Site Reviews include physical inspections, owner interviews and inventory of machinery and equipment to ensure we have accurate data on which to base our values. 2016 Site Reviews stayed constant. but should increase for 2017.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property tax calculation process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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 is already at the minimally acceptable staffing 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	2018	2018	2019	2019
Personnel	\$886,143	\$0	\$960,031	\$0
Materials & Supplies	\$39,882	\$0	\$39,361	\$0
Internal Services	\$109,841	\$0	\$117,294	\$0
Total GF/non-GF	\$1,035,866	\$0	\$1,116,686	\$0
Program Total:	\$1,035,866		\$1,116,686	
Program FTE	8.30	0.00	8.25	0.00

Program Revenues				
Intergovernmental	\$238,149	\$0	\$260,478	\$0
Total Revenue	\$238,149	\$0	\$260,478	\$0

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 \$3,808,154, with \$260,478 allocated to DART Property Assessment Industrial program. Remaining Program support is from General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72032 DART Property Assessment Industrial

Position reclassified from A&T Technician 2 (JCN 6451) to Property Appraiser 1 (JCN 6051). 3,000 real property accounts were transferred from Commercial Appraisal to the Industrial Appraisal program.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property tax calculation 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 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	2018	2018	2019	2019
Personnel	\$1,758,946	\$0	\$1,850,364	\$0
Contractual Services	\$30,500	\$0	\$500	\$0
Materials & Supplies	\$89,147	\$0	\$100,732	\$0
Internal Services	\$228,643	\$0	\$215,407	\$0
Total GF/non-GF	\$2,107,236	\$0	\$2,167,003	\$0
Program Total:	\$2,107,236		\$2,167,003	
Program FTE	15.40	0.00	15.25	0.00

Program Revenues				
Intergovernmental	\$475,926	\$0	\$481,731	\$0
Total Revenue	\$475,926	\$0	\$481,731	\$0

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 \$3,808,154, with \$481,731 allocated to DART Commercial Property Appraisal Program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72033 DART Commercial Property Appraisal

Department: County Management **Program Contact:** Denise Terry
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Residential Property Appraisal Program, within the Division of Assessment, Recording and Taxation (DART), is responsible for valuing and appraising all residential-use Real Property, residential converted to commercial use, generic commercial use, personal property floating property, and personal property manufactured homes and all land specially assessed for use as farm, forest and open space. Residential Property represents 62% of the total taxable assessed value upon which taxes are calculated and levied for the benefit of all Multnomah County taxing districts.

Program Summary

This program is responsible for maintaining Real Market Value and Maximum Assessed Value on 210,700 single family and two-four family properties; 36,400 condominiums; 4,900 manufactured homes; 1,890 floating properties; 2,730 farm/forest deferral properties; and 1,200 business accounts. Staff physically inspects and appraises 8,000 to 9,000 properties annually due to permits issued for new construction, remodeling or renovation. They also appraise 8,000 to 9,000 properties annually discovered through the sales confirmation process and as having been significantly improved without apparent issuance of building or trade permits.

Under Measure 50, such appraisals add new value for taxing districts beyond the statutorily required 3% increase in the Maximum Assessed Value. Appraisals are also performed to defend values under appeal; and to verify that sales of property are valid market-based transactions that can be used to adjust automated valuation models, to appraise other property, and to generate the annual Ratio Report that measures the effectiveness of the program. This program primarily contributes to the fair and accurate appraisal of residential property as required by the Oregon Revised Statutes (ORS).

Maintaining accurate Real Market Values on all property directly affects the maximum bonding capacity and general obligation bond tax rates for all applicable taxing districts in the County. The program ensures that all residential property is valued in accordance with the law, which maximizes property tax revenues to fund programs for the County and other jurisdictions. Property taxes account for approximately 60% of the County's General Fund revenues.

Various computer and online tools are used to maximize appraisal effort. Focus is on discovery of new taxable property. Accurate values maximize the level of tax assessment allowed under Measure 5 and Measure 50 tax limitation measures.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Accounts Appraised	17,878	17,000	17,000	17,500
Outcome	New Taxable Exception Value (in millions of dollars)	\$720	\$720	\$715	\$705
Efficiency	Accounts Appraised per Appraiser	745	750	765	765
Outcome	% Neighborhood with COD Compliance	98%	98%	98%	98%

Performance Measures Descriptions

Oregon law requires property appraisals to be at 100% of Market Value as of January 1 of each year within standards established by the Oregon Department of Revenue (DOR). One of the primary standards is a statistical measure called the Coefficient of Dispersion (COD). Failure to meet these standards can result in loss of CAFFA grant revenue and program control. The DOR annually reviews compliance through three required reports: The Assessor's Certified Ratio Study, the Assessor's Appraisal Plan and the CAFFA Grant application.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92,205,294,305,306,307,308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment and property tax calculation 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 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	2018	2018	2019	2019
Personnel	\$3,403,680	\$0	\$3,673,931	\$0
Contractual Services	\$10,500	\$0	\$500	\$0
Materials & Supplies	\$131,807	\$0	\$140,492	\$0
Internal Services	\$515,217	\$0	\$671,128	\$0
Total GF/non-GF	\$4,061,204	\$0	\$4,486,051	\$0
Program Total:	\$4,061,204		\$4,486,051	
Program FTE	31.60	0.00	31.00	0.00

Program Revenues				
Intergovernmental	\$976,745	\$0	\$978,696	\$0
Total Revenue	\$976,745	\$0	\$978,696	\$0

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 \$3,808,154, with \$978,696 allocated to DART Residential Appraisal Program. Remaining Program support is from General Fund Revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72034 DART Residential Property Appraisal

Moved Property Appraiser 2 position #705241 from Residential Appraisal Program # 72034 to Personal Property Assessment #72031. Increased allocation of Chief Appraiser Position #711531 from .60 to 1.00 FTE. Net reduction of .60 FTE to program.

Department: County Management **Program Contact:** Mike Vaughn
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

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.

Program Summary

The Division of Assessment, Recording and Taxation (DART) is seeking a system upgrade 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 will reduce systemic gaps and duplication of data existing in our current environment. It will increase 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.

Deliverables expected to pay FY 2018(minus 20% retention): CAMA Programming, Assessment Administration Programming, Unit Testing, Appraisal Configuration Test and Validation , Appraisal UAT Development Support, Simple Conversion Balancing, Final CAMA Valuation and Calculation Pages, Assessment Administration/Exemption Calculation and Setup, Appraisal End-to-End Application Testing, Appraisal Go-Live Support, Final 50% Development Specifications, Initial Tax and Balancing Setup. Initial 50% Tax Programming and Collections Training 40% Data Conversion Coding and Testing, 40% Conversion Program Testing. Phased Delivery Support, Final Tax Balancing and Calculation Setup, Collection Configuration Test and Validation and Collections UAT Development Support. Production Conversion and Production Conversion Balancing.

Deliverables expected to pay in FY 2019: Final 50% of Tax Programming, Collections End-to-End Application Testing, Collections Go-Live Support, Acceptance Support, Final Acceptance, and Retainage Payment.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of A&T System Project Milestones Met	2	25	31	6
Outcome	% of A&T Project Milestones Completed on Time	50%	100%	100%	100%
Outcome	% of A&T Project Milestones Completed within Budget	100%	100%	100%	100%

Performance Measures Descriptions

The multi-year project to select and implement a new A&T System has defined milestones for deliverables by fiscal year. Accomplished FY15: Project Plan, Install Base System, Fit Analysis Report. FY16: Data Conversion Strategy/Specifications, Initial CAMA Valuation & Calculation Pages, Initial 50% Development Specifications, Initial Assessment Administration/Exemption Calculations & Setup. Expected accomplishments in FY 2017, FY 2018 and FY 2019 are described in Program Summary.

Legal / Contractual Obligation

Multnomah County contract #4400001183 with Tyler Technologies Inc. totaling \$5,504,327. Multi-year contract executed in June 2014 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. \$1,354,860 paid in FY14 for Software License; \$230,740 Paid in FY15; \$569,763 paid in FY16; \$171,865 paid in FY17. Additional Contract payments due upon completion and acceptance of project milestones in FY18 through FY19.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$0	\$385,997	\$0	\$220,531
Contractual Services	\$0	\$2,752,903	\$0	\$1,822,737
Total GF/non-GF	\$0	\$3,138,900	\$0	\$2,043,268
Program Total:	\$3,138,900		\$2,043,268	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Beginning Working Capital	\$0	\$3,138,900	\$0	\$2,043,268
Total Revenue	\$0	\$3,138,900	\$0	\$2,043,268

Explanation of Revenues

Beginning Working Capital for FY 2019 represents the estimated carryover of unspent Fund 2504 project fund balance, after projected FY 2018 expenditures.

Significant Program Changes

Last Year this program was: FY 2018: 72035 DART Assessment & Taxation System Upgrade

Department: County Management **Program Contact:** Mike Vaughn
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

The DART Residential Development Program is an innovative new program to improve the accuracy of assessment records in an effort to ensure continued statutory compliance and provide workforce development and appraiser training opportunities for employees from the diverse groups in our community.

Program Summary

DART's Residential Appraisal Program is responsible for maintaining Real Market Value and Maximum Assessed Value on 210,000 single family and two-four family properties; 35,700 condominiums; 4,900 manufactured homes; 1,880 floating properties; 2,750 farm/forest deferral properties; and 1,300 business accounts. Maintaining accurate Real Market Values on all property directly affects the maximum bonding capacity and general obligation bond tax rates for all applicable taxing districts in the County. The program ensures that all residential property is valued in accordance with the law, which maximizes property tax revenues to fund programs for the County and other jurisdictions. Property taxes account for approximately 60% of the County's General Fund revenues.

This Program primarily contributes to the fair and accurate appraisal of residential property as required by the Oregon Revised Statutes (ORS), and will accomplish that objective by hiring and training (9) FTE temporary, limited duration staff in appraisal methodology, who will then inspect property in Multnomah that has not been inspected since 2003. Through this effort, internal assessment records will be audited and, when necessary, corrected. In addition, the increased valuation efforts and training of the LDA staff will develop a necessary Property Appraiser trainee program for DART.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Accounts Inspected		17,000	25,000	30,000
Outcome	RMV Addition (in million)		\$125	\$110	\$125

Performance Measures Descriptions

Performance Measure #1: 63,000 accounts are identified for inspection. In the first year, 17,000 accounts were viewed as a realistic goal. Looking at 4 months of work, less 1 month of training, the review process has exceeded expectations. 30,000 accounts are now viewed as a realistic goal for 2nd year, exceeding first year performance. Performance Measure #2: Inventory were corrections found on approximately 33% of records reviewed. The corrections to inventory will enable DART to generate more accurate Real Market Values, which is required by law, likely adding new taxable value.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92,205,294,305,306,307,308, 308A, 309, 310 and 321 and related Oregon Administrative Rules regulate virtually all aspects of the assessment process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Department of Revenue (DOR).

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$620,384	\$0	\$745,349	\$0
Materials & Supplies	\$15,264	\$0	\$14,876	\$0
Total GF/non-GF	\$635,648	\$0	\$760,225	\$0
Program Total:	\$635,648		\$760,225	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

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 \$3,715,272 for FY 2018. This new program will be supported in part by the grant, with remaining support from General Fund Revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72036 DART Residential Development Program

Department: County Management

Program Contact: Larry Steele

Program Offer Type: Support

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:
Executive Summary

The Applications Support (APP Support) Program manages DART's application software and hardware through configuration, support and communication with external IT vendors. They perform the functions necessary to produce the certified annual tax roll, which includes calculating tax rates and taxes and producing tax statements. As a result of these efforts, this program also maintains vital information necessary for both internal and external data requests, essential in developing statutorily required reports and providing transparency to Multnomah County stakeholders.

Program Summary

DART's Applications Support Program performs the functions that support the certification of the annual tax roll, including calculating tax rates and taxes, producing tax statements, and producing reports required by the Oregon Department of Revenue. As a result the program assists in answering public and media questions about property tax bills, contributing to the accountability factor of the public's perception of fairness in assessing and collecting property taxes. In addition to certifying the annual tax roll, the Program responds to requests for information and data files from both internal and external sources. The Program manages the working relationship with the application software and hardware vendors, as well as the County Information Technology Division; including consulting on contract formulation and implementation support. The Program answers user questions, resolves problems, and provides advice on the effective use of the Division's business application systems.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Number of Requests & Support Activities Completed	3,500	3,500	3,500	3,600
Outcome	% of Requests Associated with Program Revenue	4%	4%	4%	4%

Performance Measures Descriptions

The Number of Requests & Support Activities measures an Activity representing a single request or contact, even if that request is for 5 data files to be created and sent to the client. The percent of Requests Associated with Program Revenue indicates the portion of the program's work activities associated with a portion of our revenue.

Legal / Contractual Obligation

This program supports the Division of Assessment, Recording & Taxation in its compliance with Oregon Revised Statutes (ORS) Chapters 92, 205, 294,305-312, and 321. Additionally, ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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 & taxation staffing. The DOR has determined staffing levels are at the minimally acceptable level to perform the A&T function. 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	2018	2018	2019	2019
Personnel	\$609,334	\$0	\$748,704	\$0
Contractual Services	\$36,075	\$0	\$36,075	\$0
Materials & Supplies	\$457,260	\$0	\$465,260	\$0
Internal Services	\$339,025	\$0	\$397,993	\$0
Total GF/non-GF	\$1,441,694	\$0	\$1,648,032	\$0
Program Total:	\$1,441,694		\$1,648,032	
Program FTE	4.70	0.00	5.70	0.00

Program Revenues				
Intergovernmental	\$145,267	\$0	\$179,745	\$0
Other / Miscellaneous	\$50,000	\$0	\$50,000	\$0
Total Revenue	\$195,267	\$0	\$229,745	\$0

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 \$3,808,154, with \$179,745 allocated to DART Applications Support program. Program revenue of \$50,000 is from service fees for access to Assessment & Taxation information (subscription website user fees) and requests for Assessment and Taxation data files. Service fees are authorized by Department of County Management Fee Ordinance. Fees are projected based upon historical trends. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2018: 72037 DART Applications Support

Transferred 1 FTE Sr Data Analyst Position 704480 from Program 72029 Assessment Performance Analysis to Program 72037 Application Support

Department: County Management **Program Contact:** Rick Teague
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Tax Title Program, within the Division of Assessment, Recording and Taxation (DART), is responsible for the management, maintenance and disposition of the County's tax foreclosed property portfolio. The County's current inventory portfolio consists of approximately 230 properties. Less than 10% are properties with improvements or structures. Properties are disposed of at public sales, private sales, government transfers and donations to non-profits.

Program Summary

The County comes into ownership of real property generally once a year through the foreclosure of delinquent property tax liens. The tax foreclosed properties are deeded into the Tax Title Program portfolio and are managed and disposed of pursuant to Multnomah County Code, Chapter 7. Shortly after the properties are deeded to the County they may become available for repurchase by qualified former owners of record. The program consults with other County departments and community agencies for housing, services and support for occupants of tax foreclosed properties. Maintenance of the properties is performed through agreement and reimbursement to Department of County Assets, Facilities and Property Management Division.

The Tax Title Program researches and inspects properties received to determine their highest and best use. The program will identify property to be sold at public sale in cooperation with the Multnomah County Sheriff's Office, a private sale or to made available for donation to governments or non-profits. Effective January 1, 2016, ORS 275.275 was amended to redirect the distribution of proceeds from sales, net of approved expenses. All net proceeds will be credited to the General Fund, Sub-Fund 10030 Tax Title: Affordable Housing, for the following purposes: (i) Funds for housing placement and retention support services for youth and families with children; (ii) Flexible rental assistance to place youth and families with children into housing; or (iii) Funds to develop new low income housing that is affordable to youth and families with children with 30 percent or lower median family income.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Properties remaining in Tax Title Inventory	222	200	215	205
Outcome	Properties placed back on the tax roll & into community use	27	30	20	25
Outcome	Revenue credited to General Fund, Sub-Fund	\$1,562,637	\$1,275,000	\$1,050,000	\$423,944

Performance Measures Descriptions

The goal of the program is to reinstate tax foreclosed properties to the tax roll or into public use. At the end of every budget year the tax foreclosed property revenues are totaled, operating expenses and pass-through payments are accounted for, and the balance of revenue will be disbursed to Multnomah County General Fund, Sub-Fund 10030 Tax Title: Affordable Housing.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) 275 details how counties are to manage and dispose of tax foreclosed properties. ORS 312 details the foreclosure process & responsibilities of the county including guidance on how the redemption period can be reduced when there is evidence of waste and abandonment. ORS 271 provides information concerning the transfer of foreclosed properties to non-profits & government agencies. ORS 98 details procedures concerning abandoned property & vehicles at foreclosed property. Multnomah County Code Chapter 7 specifically states how tax foreclosed properties are to be managed and the process to be used for disposition.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Personnel	\$247,867	\$0	\$209,293	\$0
Contractual Services	\$1,424,200	\$0	\$574,144	\$0
Materials & Supplies	\$102,707	\$0	\$95,780	\$0
Internal Services	\$36,784	\$0	\$30,823	\$0
Total GF/non-GF	\$1,811,558	\$0	\$910,040	\$0
Program Total:	\$1,811,558		\$910,040	
Program FTE	2.10	0.00	1.60	0.00

Program Revenues				
Fees, Permits & Charges	\$50	\$0	\$50	\$0
Taxes	\$8,974	\$0	\$8,322	\$0
Other / Miscellaneous	\$1,800,000	\$0	\$900,000	\$0
Interest	\$2,534	\$0	\$1,668	\$0
Total Revenue	\$1,811,558	\$0	\$910,040	\$0

Explanation of Revenues

The Program is financially self sustaining. Program revenues include contract principle \$8,322 and interest estimated \$1,668 from contracts and repurchases of tax foreclosed properties. Sales of Tax Foreclosed Properties (public sales, auctions, repurchases, and private sales) are estimated at \$900,000 for FY19. Fees of \$50 are for late fees on contract payments per County Fee Ordinance. When program actual revenues exceed the program's operating costs, the excess is distributed to Multnomah County Fund 10030 Tax Title: Affordable Housing, in accordance with ORS 275.275, and per formula provided in ORS 311.390.

Significant Program Changes

Last Year this program was: FY 2018: 72038 DART Tax Title

Transferred 0.50 FTE from Program 72038 DART Tax Title to Program 72023 Div of Assessment Recording & Taxation Administration for FY 2019

Department: County Management **Program Contact:** Anna Plumb
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

This program offer requests \$100,000 of one-time-only General Fund to facilitate implementation of key recommendations related to improving the mental health care system in Multnomah County. The funds in this program offer will pay for a contractor who will work with the Evaluation and Research Unit, Health Department, Commissioner Sharon Meieran's office, local subject matter experts, and community stakeholders to advance this work.

Program Summary

The mental health care system is complex, and it involves many cross-sector partners. It is important that resources are aligned so that people who need to access services can navigate seamlessly through the system and get the help they need in an effective manner.

In FY 2018, the Board approved one-time-only funds for a contractor to produce a comprehensive report describing strengths, gaps, and opportunities for improvement in the mental health care system in Multnomah County. The contractor will deliver a draft report in late April 2018 and a final report in June 2018. The draft report will be available on the District 1 website for public review and comment.

As part of the study, District 1 has held two public listening sessions to solicit feedback about the mental health system. Over 140 people in total attended the two community sessions. Additionally, the contractor interviewed 139 people over the course of more than 75 group and individual interviews. In both the listening sessions and in-depth interviews, stakeholders identified areas for improvement related to access to and coordination of services as well as connections with other systems. These challenges echo many of those outlined in previous studies and surveys of the mental health care system in Multnomah County.

The goal of this program offer is to build on and advance the work of the study by facilitating implementation of recommendations and identifying metrics to help track success across the systems involved, including but not limited to the Multnomah County Health Department, hospitals and health systems, nonprofit organizations, educational institutions, law enforcement and corrections systems, and others. This program offer also supports the involvement of community stakeholders in implementing the study's recommendations.

The Department of County Management Evaluation and Research Unit will develop and monitor the contract, in partnership with the Health Department, Commissioner Sharon Meieran's office, and other system partners.

Performance Measures

Measure Type	Primary Measure	FY17 Actual	FY18 Purchased	FY18 Estimate	FY19 Offer
Output	Detailed facilitation plan for implementing recommendations of Mental Health System Analysis.	N/A	N/A	N/A	1
Outcome	Percent of contract development and management deadlines that are met timely.	N/A	100%	83%	100%

Performance Measures Descriptions

Measure 1: In FY 2018, the deadline for the draft report was extended from the original due date because of difficulties acquiring data. All other project deadlines were met timely and we anticipate receiving the final report within the original contract timeline.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Contractual Services	\$60,000	\$0	\$100,000	\$0
Total GF/non-GF	\$60,000	\$0	\$100,000	\$0
Program Total:	\$60,000		\$100,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Significant Program Changes

Last Year this program was: FY 2018: 72042 Mental Health System Mapping

Legal / Contractual Obligation

Multnomah County Board Resolution No.2018-024 - Resolution Approving Amendments to Public Contract Review Board Rules Division 60 on Equal Opportunity in Public Contracting, Effective July 1, 2018

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2018	2018	2019	2019
Contractual Services	\$0	\$0	\$100,000	\$0
Total GF/non-GF	\$0	\$0	\$100,000	\$0
Program Total:	\$0		\$100,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Other / Miscellaneous	\$0	\$0	\$100,000	\$0
Total Revenue	\$0	\$0	\$100,000	\$0

Explanation of Revenues

Revenues collected by a portion of new construction, renovation and liquidated damages.

Significant Program Changes

Last Year this program was:

New Program