

**Priority:** Accountability **Lead Agency:** County Management  
**Program Offer Type:** Existing Operating **Program Contact:** Cindy Swick  
**Related Programs:** 72036, 72038, 72039, 72040, 72041, 72043, 72044, 72045, 72046, 72047

**Program Characteristics:**

**Executive Summary**

The Division of Assessment, Recording, and Taxation's (DART) Customer Service program was formed in mid-2008 in an effort to streamline customer contact with both telephone inquiries and walk-in customers. Customer Service is the combination of a portion of the former Tax Information Section and Central Appraisal Support Team. In addition to telephone inquiries and walk-in customers, the Customer Service team assists the organization with various projects and clerical-related assignments throughout the year.

**Program Description**

The Customer Service program responds to approximately 90,000 telephone inquiries and 34,000 walk-in customers annually. Of the 34,000 walk-in customers, approximately 19,000 are related to marriage license and domestic partnership registrations. Customer Service also assists the appraisal staff with the preparation of appraisal packets used for field inspections. Last year, staff assisted with more than 28,000 packets. Walk-in traffic requires staff to process tax payments, issue marriage licenses, issue domestic partnership registrations, sell copies and certified copies of the records, and provide general information on behalf of the organization. Customer Service staff also assists the Tax Revenue program by processing approximately 13,000 over-the-counter tax payments totaling approximately \$37 million dollars annually.

**Program Justification**

Homeowners, property owners, and taxpayers in general, have an expectation from local government to answer questions and listen to concerns regarding their property taxes and/or values. From the most fundamental questions to the most complex, the Customer Service staff has an implicit obligation to provide responsive, accurate, and quality service. Having the ability to connect directly with the taxpayer increases the understanding of government and its role in property taxation. To do so, the staff spends several hours a year, training with other sections throughout the organization for which they support, as well as, education through reading a variety of relevant, informational material.

**Performance Measures**

Measure Type	Primary Measure	Previous Year Actual (FY07-08)	Current Year Purchased (FY08-09)	Current Year Estimate (FY08-09)	Next Year Offer (FY09-10)
Output	Field Appraisal Packets Prepared for Appraisers	28,548	25,000	25,000	30,000
Outcome	Average number of phonecalls per operator	7,838	0	7,500	7,500
Input	Number of phonecalls received and answered	89,715	97,000	97,000	87,000
Efficiency	Number of phonecalls transferred	6,813	0	9,000	6,500

**Performance Measure - Description**

 **Measure Changed**

"Number of phonecalls" no longer includes "abandoned calls" as it has in the past. Last year this performance measure was reported through #72033-A&T Property Tax Collection. This year the number of calls is a true reflection of actual calls answered. The "number of calls transferred" and "average number of phonecalls per operator" are new performance measures. The Current Year Estimate (FY08-09) for transfer calls is an increase over the Previous Year's Actual, due to the consolidation of sections and the natural course of learning new information. The Next Year Offer (FY09-10) indicates a decrease, due to staff becoming more familiar with the information, thereby transferring fewer calls. Last year, the number of "field appraisal packets prepared for appraisers" was reported through #72042-A&T-Central Appraisal Support.

## 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 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 Account" (CAFFA) Grant process described in ORS 294.175 the Department of Revenue (DOR)determines the acceptable level of assessment and taxation (A&T) staffing. The DOR has determined that DART staffing is 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
<b>Program Expenses</b>	2009	2009	2010	2010
Personnel	\$772,152	\$0	\$763,468	\$0
Contracts	\$1,778	\$0	\$0	\$0
Materials & Supplies	\$17,168	\$0	\$15,751	\$0
Internal Services	\$170,199	\$0	\$191,867	\$0
Subtotal: Direct Exps:	<b>\$961,297</b>	<b>\$0</b>	<b>\$971,086</b>	<b>\$0</b>
Administration	\$79,099	\$0	\$89,365	\$0
Program Support	\$187,810	\$0	\$98,616	\$0
Subtotal: Other Exps:	<b>\$266,909</b>	<b>\$0</b>	<b>\$187,981</b>	<b>\$0</b>
Total GF/non-GF:	<b>\$1,228,206</b>	<b>\$0</b>	<b>\$1,159,067</b>	<b>\$0</b>
Program Total:	<b>\$1,228,206</b>		<b>\$1,159,067</b>	
Program FTE	9.50	0.00	9.50	0.00
<b>Program Revenues</b>				
Fees, Permits & Charges	\$13,104	\$0	\$0	\$0
Intergovernmental	\$103,905	\$0	\$209,400	\$0
Other / Miscellaneous	\$23	\$0	\$0	\$0
Program Revenue for Admin	\$58,779	\$0	\$42,519	\$0
<b>Total Revenue:</b>	<b>\$175,811</b>	<b>\$0</b>	<b>\$251,919</b>	<b>\$0</b>

## Explanation of Revenues

Through participation in the State funded County Assessment Function Funding (CAFFA) Grant, approximately 25% of actual expenditures are reimbursed with remaining support from General Fund revenues.

## Significant Program Changes

✔ **Significantly Changed**

**Last year this program was:** #72042, DCM - A&T-Property Assessment-Central Appraisal Support

Last year this program was a portion of #72033 DCM - A&T - Property Tax Collection and #72042 Central Appraisal Support. Due to a reorganization,staff from the Central Appraisal Support Team were enfolded with Tax Information and Records Management staff to form a new Customer Service Program. A total of 9.50 FTE were assigned to this new program.