

Priority: Accountability
Program Offer Type: Existing Operating
Related Programs: 72050

Lead Agency: County Management
Program Contact: Randy Walruff

Program Characteristics:

Executive Summary

This multi-year system upgrade project was initially approved in the FY07/08 Budget. The Assessment, Recording and Taxation Division needs to replace the outdated Assessment and Taxation system. A request for proposal was published at the end of FY07/08, with the evaluation of proposals, selection of a vendor and contract negotiations proceeding through FY08/09. FY09/10 activities will include the Assessment Analysis, Taxation Analysis and Assessment Development phases. FY10/11 will include the Taxation Development, Assessment Testing, Taxation Testing, Staff Training, Implement System and Post-Implementation Support phases.

Program Description

The Division of Assessment, Recording and Taxation (DART) is seeking a system upgrade that features integration among all DART business functions, including GIS, document recording, real property assessment, business personal property assessment, tax collection and tax distribution.

Program Justification

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

Performance Measures

Measure Type	Primary Measure	Previous Year Actual (FY07-08)	Current Year Purchased (FY08-09)	Current Year Estimate (FY08-09)	Next Year Offer (FY09-10)
Output	Number of 13 A&T System Milestones Met	1	3	3	3
Outcome	% of A&T Project Milestones Completed on Time and within Budget	100	23	75	100

Performance Measure - Description

The multi-year project to select and implement a new A&T system has 13 milestones: FY07/08-Publish RFP; FY08/09-Evaluate Proposals, Select Vendor and Negotiate Contract; FY09/10-Assessment Analysis, Taxation Analysis and Assessment Development; FY10/11-Taxation Development, Assessment Testing, Taxation Testing, Train Staff, Implement System and Post-Implementation Support. The single milestone of Publishing the RFP was completed in FY07/08. We are currently on schedule to meet the 3 FY08/09 milestones (Evaluate Proposals, Select Vendor and Negotiate Contract).

Legal/Contractual Obligation

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2009	2009	2010	2010
Personnel	\$0	\$0	\$0	\$155,981
Contracts	\$0	\$0	\$0	\$2,985,103
Materials & Supplies	\$0	\$0	\$0	\$3,133,916
Capital Outlay	\$0	\$0	\$0	\$270,000
Cash Transfer	\$0	\$0	\$1,500,000	\$0
Subtotal: Direct Exps:	\$0	\$0	\$1,500,000	\$6,545,000
Administration	\$0	\$0	\$0	\$0
Program Support	\$0	\$0	\$0	\$0
Subtotal: Other Exps:	\$0	\$0	\$0	\$0
Total GF/non-GF:	\$0	\$0	\$1,500,000	\$6,545,000
Program Total:	\$0		\$8,045,000	
Program FTE	0.00	0.00	0.00	1.00
Program Revenues				
Other / Miscellaneous	\$0	\$0	\$0	\$6,545,000
Program Revenue for Admin	\$0	\$0	\$0	\$0
Total Revenue:	\$0	\$0	\$0	\$6,545,000

Explanation of Revenues

Increased revenue is anticipated the first year following implementation (FY 12/13) as a result of productivity improvements for staff as well as a phased-in realignment of personnel from office support to field work finding taxable value. When new value is put on the tax roll, the corresponding tax growth is carried forward every year, and is compounded by the Measure 50 maximum 3% growth. The 10-year total increase in property tax revenue for Multnomah County of \$7.7 M is based on a rate of increase in new taxable value of 4% per year. The 10 year total increase for all taxing districts will be \$32.1 million. Project Funding proposed: Projected total costs \$6.5 million; Utilize existing Fund 2504 balance of \$300K, \$1.5 million from General Fund, and \$4.7 million in financing proceeds. Estimate an increase in County Assessment Function Funding Acct (CAFFA) Grant revenue. Capital expenditures for Systems upgrades are an allowable expenditure in the annual CAFFA grant application, up to a defined cap amount per year. DOR has approved including the cost of the System Upgrade Project up to the allowable Cap amount annually, thereby maximizing the CAFFA grant revenues. The increase in budgeted allowable expenditures in the CAFFA Grant application increases the county's share (% distribution) of the available statewide CAFFA funding pool.

Significant Program Changes

Last year this program was:

Work continues to keep the A&T System Upgrade project on schedule. A Limited Duration project manager was added during FY07.