

**Lead Agency:** County Management

**Program Contact:** Cindy Swick

**Program Offer Type:** Existing Operating

**Related Programs:** 72036, 72038, 72039, 72040, 72041

**Program Characteristics:** In Target

**Executive Summary**

The Division of Assessment, Recording, and Taxation (DART) Customer Service Program was formed in mid-2008 to enhance and streamline customer service needs. Customer Service staff is responsible as the first point of contact for DART both at the public counter and on the organization's incoming phone system.

**Program Description**

The Customer Service program responds to approximately 92,000 telephone inquiries and 25,000 walk-in customers annually (which includes approximately 16,000 reported in the County Clerk Function Program Offer). Staff processes tax payments, sells copies and certified copies of the records, and provides general information on behalf of the organization. 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, as well as education through reading a variety of relevant informational material. Customer Service staff also assists the Tax Revenue program by processing approximately 11,336 over-the-counter tax payments totaling approximately \$52.5 million dollars annually.

**Performance Measures**

Measure Type	Primary Measure	Previous Year Actual (FY09-10)	Current Year Purchased (FY10-11)	Current Year Estimate (FY10-11)	Next Year Offer (FY11-12)
Output	Number of counter transactions	24,953	32,000	25,000	25,000
Outcome	Average number of transactions per cashier	3,119	4,000	3,200	3,200
Output	Number of phone calls received and answered	92,217	95,000	90,000	90,000
Outcome	Average number of phone calls per operator	6,148	4,800	6,000	6,000

**Performance Measure - Description**

"Number of counter transactions" includes statistics that are both computer-generated statistics from the operating systems used in Customer Service and from staff production reports. The system tracks revenue generating transactions including Tax Payments, Marriage Licence and Domestic Partnership Registration fees, Passport Application acceptance fees, and fees for copies of various records. Staff production reports track routine, non-payment transactions. An additional 10% was added to the production report statistics for transactions that may not have been tracked.

## 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 Department of Revenue (DOR). Through the "County Assessment Function Funding Account" (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
<b>Program Expenses</b>	2011	2011	2012	2012
Personnel	\$721,369	\$0	\$715,769	\$0
Materials & Supplies	\$16,726	\$0	\$14,733	\$0
Internal Services	\$260,772	\$0	\$236,759	\$0
Total GF/non-GF:	<b>\$998,867</b>	<b>\$0</b>	<b>\$967,261</b>	<b>\$0</b>
Program Total:	<b>\$998,867</b>		<b>\$967,261</b>	
Program FTE	9.50	0.00	9.50	0.00
<b>Program Revenues</b>				
Intergovernmental	\$241,850	\$0	\$237,240	\$0
<b>Total Revenue:</b>	<b>\$241,850</b>	<b>\$0</b>	<b>\$237,240</b>	<b>\$0</b>

## Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Account (CAFFA) Grant, which supports Assessment & Taxation Programs, provides reimbursement of approximately 25% of program expenditures. Total annual Multnomah County share of CAFFA is estimated at \$3.6 Million, with \$237,240 allocated to the DART Customer Service Program. Remaining program support is from General Fund revenues.

## Significant Program Changes

Last year this program was: #72037, DCM - DART Customer Service