

**Lead Agency:** County Management

**Program Contact:** Randy Walruff

**Program Offer Type:** Existing Operating

**Related Programs:** 72036, 72037, 72039, 72040, 72041, 72042, 72043, 72044, 72045, 72046, 72047, 72050

**Program Characteristics:** In Target

### Executive Summary

This multi-year system upgrade project was initially approved in the FY07/08 Budget. The Division of Assessment, Recording and Taxation is replacing the outdated Assessment and Taxation system.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 included detailed analysis of the required functionality and the vendor's software application, and defining the programming changes required due to Oregon property tax statutes. FY10/11 will complete the detailed analysis and definition of programming changes, and the beginning of development by the vendor as well as the beginning of data migration analysis. The project's major stages will be completed in FY11/12 with the completion of development, testing of those changes, staff training, and implementation of the new software.

### 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. 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 (FY09-10)	Current Year Purchased (FY10-11)	Current Year Estimate (FY10-11)	Next Year Offer (FY11-12)
Output	Number of A&T System Project Milestones Met	4	8	5	7
Outcome	% of A&T Project Milestones Completed on Time and within Budget	100.0%	100.0%	100.0%	100.0%

### Performance Measure - Description

The multi-year project to select and implement a new A&T system has met the following milestones: FY07/08-Publish RFP; FY08/09-Evaluate Proposals, Select Vendor and Negotiate Contract; FY09/10-GAP Analysis Start, Design Start, Development Start (a), and Server/Oracle Installed. The FY10/11 milestones are: GAP Analysis Finish, Design Finish, Development Start (b), Data Migration Start, and Integrations Start. The FY11/12 milestones are: Development Finish, Data Migration Finish, System Testing, Training, PC Deployment, Integrations Finish and Go-Live. FY12/13 milestone is: Post Go-Live Support.

## Legal/Contractual Obligation

## Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
<b>Program Expenses</b>	2011	2011	2012	2012
Personnel	\$0	\$156,660	\$0	\$154,036
Contracts	\$0	\$2,930,337	\$0	\$2,031,981
Materials & Supplies	\$0	\$1,958,539	\$0	\$1,515,021
Internal Services	\$0	\$54,464	\$0	\$0
Total GF/non-GF:	<b>\$0</b>	<b>\$5,100,000</b>	<b>\$0</b>	<b>\$3,701,038</b>
Program Total:	<b>\$5,100,000</b>		<b>\$3,701,038</b>	
Program FTE	0.00	1.00	0.00	1.00
<b>Program Revenues</b>				
Other / Miscellaneous	\$0	\$5,100,000	\$0	\$3,701,038
<b>Total Revenue:</b>	<b>\$0</b>	<b>\$5,100,000</b>	<b>\$0</b>	<b>\$3,701,038</b>

## 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. BWC Revenue is the estimated carryover of Fund 2504 after FY11 anticipated expenditures. Capital expenditures for Systems upgrades are an allowable expenditure in the annual County Assessment Function Funding Account (CAFFA) grant application, up to a defined cap amount per year. The Department of Revenue (DOR) has approved including the cost of the System Upgrade Project up to the allowable Cap amount annually, thereby maximizing CAFFA grant revenues for programs supported by the grant funds. 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: #72048, DCM - DART Assessment & Taxation System Upgrade