

Lead Agency: County Management

Program Contact: Gary Bartholomew

Program Offer Type: Existing Operating

Related Programs: 72023, 72025, 72026, 72027, 72028, 72035, 72037

Program Characteristics: In Target

Executive Summary

The Division of Assessment, Recording, and Taxation (DART) Customer Service Program is the first primary point of contact for DART customers both at the public counter and through the organization's incoming phone system.

Program Description

The Customer Service program responds to approximately 90,000 telephone inquiries and 30,000 walk-in customers annually (which includes approximately 18,000 reported in the County Clerk Function Program Offer). Staff process tax payments, sell copies of records and provide general information on behalf of the organization. Property owners, taxpayers and citizens in general have an expectation of local government to provide responsive, accurate, and quality service. The ability to connect directly with the taxpayer increases the understanding of government and the role of property taxation.

Staff spend several hours each year training with other sections throughout the organization, as well as gaining knowledge by reading a variety of relevant informational materials. Customer Service staff also assist the Tax Revenue Management Program by processing approximately 11,000 over-the-counter tax payments totaling approximately \$50 million dollars annually. The Customer Service office, Recording office and Public Research Room are being integrated in 2012 in order to improve efficiency and quality of service delivery. Additional improvements are expected from technology updates including a new assessment and taxation system, an electronic customer cueing system and an online chat tool.

Performance Measures

Measure Type	Primary Measure	Previous Year Actual (FY10-11)	Current Year Purchased (FY11-12)	Current Year Estimate (FY11-12)	Next Year Offer (FY12-13)
Output	Number of counter transactions	31,296	25,000	30,000	30,000
Outcome	Average number of transactions per cashier	3,477	3,200	3,200	3,200
Output	Number of phone calls received and answered	89,284	90,000	90,000	90,000
Outcome	Average number of phone calls per operator	7,511	6,000	6,500	6,500

Performance Measure - Description

"Number of counter transactions" includes both computer-generated statistics from the operating systems used in Customer Service and statistics from staff production reports. The system tracks revenue generating transactions including tax payments, marriage licenses, Domestic Partnership Registrations, passport applications and 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, 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 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
Program Expenses	2012	2012	2013	2013
Personnel	\$701,062	\$0	\$722,989	\$0
Materials & Supplies	\$14,733	\$0	\$11,685	\$0
Internal Services	\$252,369	\$0	\$261,076	\$0
Total GF/non-GF:	\$968,164	\$0	\$995,750	\$0
Program Total:	\$968,164		\$995,750	
Program FTE	8.20	0.00	9.30	0.00
Program Revenues				
Intergovernmental	\$231,102	\$0	\$235,724	\$0
Total Revenue:	\$231,102	\$0	\$235,724	\$0

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 \$3,518,268, with \$235,724 allocated to the DART Customer Service Program. Remaining program support is from General Fund revenues.

Significant Program Changes

✔ Significantly Changed

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

Continued division reorganization resulted in transfer of 1.00 FTE A&T Technician 2 from Program #72030 Special Programs to the Customer Service Program #72024 for FY 2013. Additional 0.10 FTE Finance Manager allocated to the Program for FY 2013.