

Lead Agency: County Management **Program Contact:** Gary Bartholomew
Program Offer Type: Existing Operating
Related Programs: 72023, 72025A, 72026, 72027, 72028, 72035, 72037
Program Characteristics:

Executive Summary

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

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 were integrated in 2012 thereby improving efficiency and quality of service delivery. Additional improvements from technology updates included an electronic customer queuing system and an online chat tool. Further improvements are expected from a new assessment and taxation system scheduled for 2014.

Performance Measures

| Measure Type | Primary Measure | Previous Year Actual (FY11-12) | Current Year Purchased (FY12-13) | Current Year Estimate (FY12-13) | Next Year Offer (FY13-14) |
|--------------|---|--------------------------------|----------------------------------|---------------------------------|---------------------------|
| Output | Number of counter transactions | 40,743 | 30,000 | 35,000 | 37,000 |
| Outcome | Average number of transactions per cashier | 4,074 | 3,200 | 3,600 | 3,800 |
| Output | Number of phone calls received and answered | 75,015 | 90,000 | 90,000 | 85,000 |
| Outcome | Average number of phone calls per operator | 6,251 | 6,500 | 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 Assistance" (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 | 2013 | 2013 | 2014 | 2014 |
| Personnel | \$722,499 | \$0 | \$750,465 | \$0 |
| Materials & Supplies | \$11,685 | \$0 | \$16,744 | \$0 |
| Internal Services | \$238,396 | \$0 | \$218,957 | \$0 |
| Total GF/non-GF: | \$972,580 | \$0 | \$986,166 | \$0 |
| Program Total: | \$972,580 | | \$986,166 | |
| Program FTE | 9.30 | 0.00 | 9.30 | 0.00 |
| Program Revenues | | | | |
| Intergovernmental | \$273,017 | \$0 | \$306,520 | \$0 |
| Total Revenue: | \$273,017 | \$0 | \$306,520 | \$0 |

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant, which supports Assessment & Taxation Programs, provides reimbursement of approximately 25% of Assessment & Taxation program expenditures, and can vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Total annual Multnomah County share of CAFFA is estimated at \$3,950,000 for FY14, with \$306,520 allocated to DART Customer Service Program. Remaining Customer Service Program support is provided by General Fund revenues.

Significant Program Changes

Last year this program was: #72024, DART Customer Service
OA2 position transferred from Personal Property (#72031) to Customer Service Program. Position reclassified from A&T Technician 1 to Property Appraiser 2 and portion allocated to Customer Service in FY13 (.50 FTE) was transferred to Residential Appraisal (#72034). Tech 2 position formerly allocated to Customer Service, was partially allocated (.50 FTE) to County Clerk Function (#72025). No net change in FTE overall from FY13 to FY14.