

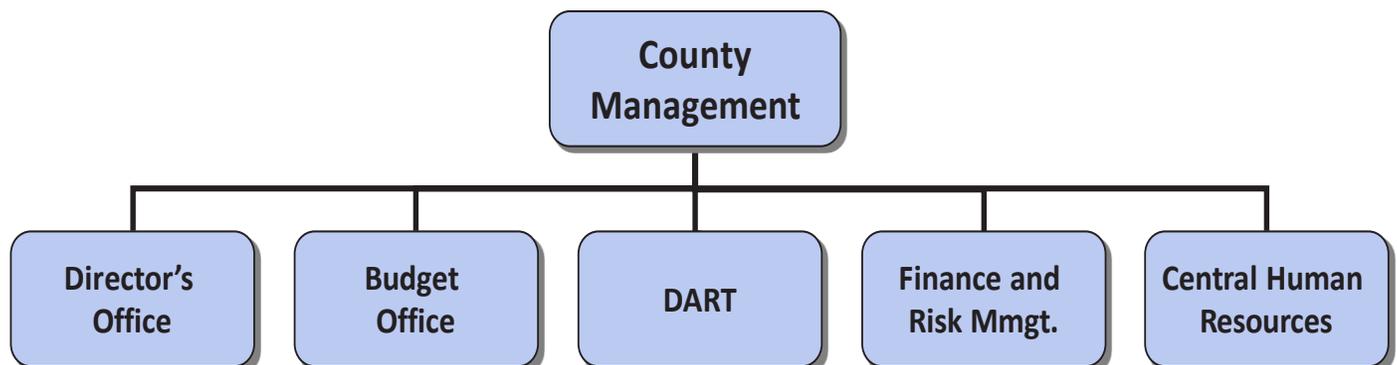
Department Overview

The Department of County Management (DCM) is responsible for collecting, protecting, and investing in Multnomah County’s human and financial capital. DCM manages and trains the County’s workforce, pays the County’s bills and safeguards its funds. Finance and Risk Management, Central Human Resources, and the Central Budget Office work with the Chair, Chief Operating Officer (COO), and departments to set countywide policies that protect County assets, reduce financial risk, and ensure the County’s ability to serve the community. The Division of Assessment, Recording and Taxation (DART) maintains property records and assessments and collects property taxes, the primary source of General Fund revenue.

The COO position within the DCM Director’s Office provides countywide oversight through the supervision of the appointed department directors across the County. In addition, with the assistance of the Deputy COO, the COO provides oversight for the Department of County Management. The department provides administrative services and guidance to all County departments. DCM also supports the Chair, Commissioners and other elected officials with high-level forecasts and policy analysis.

Two years into the COVID-19 pandemic, DCM teams continue to guide the organization into the future of work as a significant portion of the workforce teleworks on a routine, ad-hoc, or hybrid basis. Even while many are working remotely, DCM staff are committed to supporting the County’s pandemic response, maintaining our commitment to workforce equity, and serving our internal and external customers with excellence.

Creating a workplace that provides a sense of safety, trust and belonging for every employee takes both structural and cultural change. In FY 2023, DCM will continue to focus on sustaining and supporting DCM and countywide Workforce Equity Strategic Plan (WESP) work and supporting the County’s pandemic response. In addition the department will focus on supporting the Preschool for All tax, the expansion of the Joint Office of Homeless Services (JOHS) related to the Metro Supportive Housing Services Measure, the Library Capital Bond, and the investment and reporting of American Rescue Plan funds.



Budget Overview

The Department of County Management’s (DCM) budget is \$232.2 million and 293.00 FTE. This is an increase of \$23.5 million or 11.2% over the FY 2022 Adopted budget. Budgeted positions have increased by 6.00 FTE. The FY 2023 budget is comprised of 24.4% General Fund and 75.6% other funds.

The General Fund budget has increased by \$6.3 million (12.6%) to \$56.8 million. In DCM, the Risk Fund has increased by \$21.7 million (15.1%) to \$164.9 million due to the addition of 452.53 FTE countywide and insurance related rate changes.

Personnel Services have increased by \$3.5 million (7.6%) due to the addition of 6.00 FTE, COLA and step/merit adjustments. The largest category of expenditures in all funds is in materials and supplies at \$159.3 million. This is mostly budgeted in the Risk Fund for medical and dental insurance costs. Risk Fund expenditures in this category have increased by \$21.6 million.

The following programs are new:

- COO Professional Services (72000B) \$100,000 to respond to various issues,
- Capital Planning (72013) \$150,000 one-time-only (OTO)
- Contractor Capacity Review (72055) \$250,000 OTO
- Workplace Security (72056) \$750,000
- Expanded Workday Support (72022B, 72046B, 72053) \$1,431,717 of which \$1,000,000 is OTO to optimize Workday for the County’s needs. It also adds 2.00 FTE to the Finance and HR Workday teams.
- American Rescue Plan (ARP) - Future of Work Coordinator and Space Planning (72901) \$2,705,000 which includes resources to develop and implement plans for space reconfiguration due to telework.

Budget Trends	FY 2021	FY 2022	FY 2022	FY 2023	Difference
	Actual	Estimate	Adopted Budget	Adopted Budget	
Staffing FTE	277.75	287.00	287.00	293.00	6.00
Personnel Services	\$38,432,562	\$44,473,186	\$45,792,842	\$49,289,557	\$3,496,715
Contractual Services	5,372,530	20,193,102	20,029,880	17,258,210	(2,771,670)
Materials & Supplies	109,776,064	130,446,928	135,794,184	159,256,069	23,461,885
Internal Services	5,792,144	6,139,839	6,139,839	6,425,809	285,970
Debt Service	0	7,062,417	1,000,000	0	(1,000,000)
Capital Outlay	45,976	0	0	0	0
Total Costs	\$159,419,275	\$208,315,472	\$208,756,745	\$232,229,645	\$23,472,900

Successes and Challenges

Office of the Chief Operating Officer (COO)/DCM Director

- Integrated the new COO and team: the Deputy COO, Strategic Initiatives Manager, and Administrative Analyst.
- Administered workforce and supplier vaccine mandates, setting procedures and answering commonly asked questions.
- Organized countywide Town Halls on the vaccine mandate, the Future of Work, and the omicron variant.
- Created a Workforce Security Leadership Team focused on taking a strategic look at countywide solutions to workplace violence.

Budget Office

- Expanded its communication efforts and methods, including instituting a regular Budget Bulletin covering time-sensitive issues, providing live online training sessions related to the budget process and budget software, and developing numerous video trainings available when most convenient for departmental users (supplementing already-existing written materials).
- Received the Government Finance Officers Association's Distinguished Budget Presentation Award for the FY 2022 budget.
- The Evaluation and Research Unit (ERU) completed the countywide Pay Equity Compliance Study, to ensure that individuals doing comparable work are being paid equitably considering their experience, tenure at the County, seniority in the job, and education.

Central Human Resources

- Held vaccine clinics for 4,969 employees and their household members.
- Implemented new medical and Employee Assistance programs January 1, 2022, which has been complex and difficult.
- Negotiated a record number of mid-term bargaining agreements including vaccine mandate and exemption process, frontline worker pay, Telework Personnel Rule, and pilot incentive program for shelter staffing.
- Developed Future of Work change communications, learning and support resources, and held live sessions.
- Met Workforce Equity Strategic Plan College to County placement goals a year ahead of schedule (54 interns hosted in summer 2021).
- Recruitments continue to be a countywide challenge with a high number of vacancies, backlog of recruitments, and new recruiters joining the County.

Division of Assessment, Recording and Taxation

- Levied, collected and distributed \$2.2B in property taxes on behalf of 65 taxing districts.
- Opened DART in July to in-person, customer services including Recording, Marriage License Applications, Tax Payment processing, and Passport applications.

Successes and Challenges (continued)

Division of Assessment, Recording and Taxation

- E-file contracting and implementation of a system simplifying how businesses file personal property returns with our office for property taxes.
- Implementation of a new Digital Research Room that allows customers to research and print DART records from anywhere--currently, these documents are only available through in-person research and printing.

Finance and Risk Management

- Received GFOA Award for Distinguished Financial Reporting for Annual Comprehensive Financial Report.
- Issued General Obligations Bonds for Library Capital Construction Project.
- Successfully developed tax administration program for new Preschool for All income tax.
- Maintained Oregon Office of Occupational Safety and Health (OR-OSHA) compliance for essential County employees.
- Successfully completed procurements for countywide banking and deferred compensation services.
- Completed fiscal monitoring of over 150 Community Based Organizations (CBO), and performed over 70 risk assessments.
- Central Purchasing supported the implementation of the new Labor Harmony Policy.
- Challenges included increased demand for training and support of new finance staff countywide; coordination of added reporting requirements for COVID-19 related funding; and overall increase in volume of finance related transactions due to increase in COVID-19 funding.

COVID-19 Impacts

Many DCM staff continue to telework on a routine, ad-hoc, or hybrid basis. Future of Work pilot policies are currently being evaluated and if rates of COVID-19 infection decrease, the County can shift from a workforce telework pilot period to a longer-term approach.

Central Human Resources continues to work diligently to provide information, resources and updates to programs and policies to support County employees. This includes regular countywide communication, managing testing and vaccine programs, and implementing new state and federal laws.

The Finance and Risk Management Division continues to manage COVID-19 related revenues and expenditures, perform all required federal grant reporting (e.g. ARPA, ERAP), support monetary client assistance solutions (e.g. food assistance, economic assistance, and vaccine incentives), and maintain compliance with new OR-OSHA regulations.

The Budget Office managed a FY 2022 budget process that included over \$150 million of COVID-19 response funds as well as a significant mid-year budgeting process to address \$30.4 million of one-time-only excess Business Income Tax (BIT) revenue that was paired with additional funding from the City of Portland and the State of Oregon to meet urgent needs in the community, largely exacerbated by the COVID-19 pandemic.

DART was able to maintain all of its statutorily mandated assessment and tax collection functions; however, necessary health-protocols made in-person contacts, especially in field settings difficult or nonexistent. Several processes were developed to enhance the effectiveness of our work efforts and resulting products, such as increased use of remote service delivery, video meetings with external stakeholders, remote inspections of property using videos, and dropbox payments and marriage applications. In addition, a number of DCM employees support the County's emergency response through logistics support, roles in the emergency operations center leadership, and shelter staffing among others.

COVID-19 & American Rescue Plan

The Department of County Management will use American Rescue Plan (ARP) dollars to extend three programs funded last year into FY 2023:

ARP Labor Relations Expanded Support (72902)

This program funds a Labor Relations Manager position (Human Resources Manager 2, limited duration, year 2) to support the expansion of existing services, provide general Labor Relations support, and create additional capacity needed to bargain contracts which were rolled over due to COVID-19.

Future of Work Coordinator and Space Planning (72901)

The Future of Work initiative is a collection of projects that support the following changes in workplace including: revisions to workplace policies and practices, changes in facilities and workspace management, training and support resources, and maintaining commitment to regular countywide communications. This program funds a Future of Work Coordinator (HR Manager 1, limited duration, year 2) to provide leadership and project management. In addition, the program includes resources to develop and implement plans to reconfigure county facilities in response to updated programmatic needs due the large number of routine, hybrid and ad hoc teleworking employees.

ARP Federal Grant Compliance and Monitoring (72900)

This program is responsible for maintaining federal grant compliance with American Rescue Plan (ARP) Act laws and regulations. The dedicated position (Finance Specialist Senior, limited duration, year 2) will track County ARP spending and usage of funding, complete all federal required reporting, support general compliance to laws and regulations, support County departments with ARP fund usage, and support enhanced external audit activities as it relates to COVID-19 relief funding.

Diversity, Equity, and Inclusion

DCM embraces the vision that every employee, at every level, has a role to play in advancing equity and creating a racially just workplace. Collectively, the divisions in DCM are doing transformative work to help raise the consciousness of employees, including management at the highest levels. This mindset and the work is vital to move us towards our department's equity goals. We recognize that a great deal of our intentional efforts should ripple through the entire County, strengthening us as an organization. DCM is showing up for the challenge of dismantling white supremacy culture by providing manager training on core competencies, countywide professional development, and creating equitable budget processes and better data reporting tools. Through collaboration with our County partners, we are cultivating a system of inclusion and fairness that truly considers those who, historically, have been most hurt by our policies and practices. Here are just a few examples of how DCM is leading these efforts:

DIRECTOR'S OFFICE

- The Director's Office reinstated the DCM All Managers meetings for managers to connect and engage in learning together. At the December 2021 meeting, managers participated in a training presented by Organizational Learning on the Racially Just Core Competency.
- The DCM all staff meetings have also been revived. This informal space brings staff together to receive information and updates about current matters affecting the department and the county cutting across the department structure.
- The DCM/NON-D HR team focuses on equitable and inclusive practices and policies for all elements of our work. With many of the remaining Workforce Equity Strategic Plan commitments tied to HR actions or programs, the team will have a critical role in meeting the 2022 department goals.
- To build awareness and increase cultural humility, the DCM Equity Manager continues to lead learning sessions for the department equity committee and is incorporating a series of monthly Equity Conversations into the Senior Management Team meetings.

CENTRAL HR

- As equity practitioners, Organizational Learning (OL) infuses equity into everything they do and keeps equity as their foundation: creating new classes, selecting and vetting external instructors, offering services such as mediation, team building, and coaching.
- Future of Work workshops and countywide coordination focused on advancing equitable practices that ensure all employees, whether working remotely or onsite, are supported with opportunities to grow and thrive.

Diversity, Equity, and Inclusion (continued)

CENTRAL HR (continued)

- The College to County (C2C) program is a vital workforce pipeline to introduce folks from underrepresented communities to public service in the County. With a goal of hiring 50 C2C interns by 2022, the County met that goal a year early and surpassed the total number countywide in 2021, with DCM making up around 20% of those numbers. DCM will remain diligent in helping meet that standard again for 2022.

BUDGET OFFICE

- The Budget Office, with the Chair's Office and the Office of Diversity and Equity (ODE), continued its work to expand an equity focus in the budget process. This included updating the FY 2023 budget process and documents to reflect that budgetary decisions should be centered on equity and helping communicate this priority to the departments.
- The Budget Office reviews narrative, performance measures, and associated expenditures provided by departments during the annual budget process. They work with departments to encourage using language that will be clear to all potential audiences and tells a full story regarding the funding proposals and changes.
- ODE and Organizational Learning (Central HR) held a special countywide workshop titled, Budgeting with the Equity & Empowerment Lens, to show how to apply the County's Equity and Empowerment Lens to FY 2023 program offers.
- The Evaluation & Research Unit (ERU) performed a pay equity analysis for all employees at the County and made recommendations for pay adjustments based on the findings.
- For FY 2023, ERU will continue their equity and stakeholder-centered approach by working with stakeholders to update and implement new dashboards for employee demographic data and HR trends (e.g., hires, promotions, separations), allowing a new level of insight for all employees and continuing work with a Countywide ERU Advisory Group to center the Survey Advisory Group model in all projects.

Division of Assessment, Recording and Taxation (DART)

- The Tax Assessor and Appraisal staff attended 20 Neighborhood Association meetings in 2021 to engage community members in their neighborhoods, provide access to information regarding the property tax system, address property tax-related issues and concerns and answer general questions.
- DART presented a viewing of the film, Priced Out, to discuss systemic racism in housing using the gentrification of N/NE PDX as an example. The event was hosted by a project team that included stakeholders from various parts of the division and was attended by Commissioner Susheela Jayapal and her team from District 2.

Diversity, Equity, and Inclusion (continued)

Division of Assessment, Recording and Taxation (DART)

- In partnership with the Senior Policy Analyst in ODE, DART introduced a Gender Neutral Customer Service Model for all front-facing customer service staff to use when interacting with the public. DART is also creating accessible training video content and accessibility updates to its public facing website.

Finance & Risk Management (FRM)

- Several teams from FRM participated in diversity, equity and inclusion and team building activities and learning with the Equity Manager and Organizational Learning. The content was centered around terms and definitions and core competencies like promoting equity, communication and relationship building.
- The Chief Financial Officer’s Office, with Central Purchasing and ERP Workday Finance support, created a custom Culturally Specific Services worktag in Workday in order to highlight, support and report out on the work provided by our Community Based Organizations.

Budget by Division

Division Name	FY 2023 General Fund	Other Funds	Total Division Cost	Total FTE
DCM Director's Office	\$4,735,658	\$750,000	\$5,485,658	23.50
Budget Office	3,122,062	0	3,122,062	14.00
Finance and Risk Management	14,947,727	18,536,104	33,483,831	70.00
Central Human Resources	10,073,485	153,080,422	163,153,907	48.00
Division of Assessment, Recording & Taxation (DART)	23,884,187	0	23,884,187	137.50
COVID-19 & American Rescue Plan	0	3,100,000	3,100,000	0.00
Total County Management	\$56,763,119	\$175,466,526	\$232,229,645	293.00

DCM Director's Office

The Division is home to the County's Chief Operating Officer (COO) who also serves as the DCM Director. The COO team includes the Deputy COO, a Strategic Initiatives Manager and a Senior Administrative Analyst. Programs reporting to this division include DCM Equity Team, DCM Business Services and the newly formed DCM/Non-D Human Resources Unit.

The COO is responsible for the administrative infrastructure and financial health of the County. The COO provides strategic direction for countywide projects and ensures that complex decisions are informed by a countywide perspective. In addition, the COO and Deputy COO work with the Chair, DCM divisions, County departments, and elected officials to establish operational priorities and policy objectives. The COO supervises the directors of the Department of County Human Services, Health Department, Department of County Assets, Department of Community Services, Department of Community Justice, the Complaints Investigation Unit and Emergency Management providing a crucial link between corporate policy setting and department implementation.

The Equity team provides leadership and support for departmental learning sessions about diversity, equity and inclusion principles, and consultation for managers and individuals. The Business Services program provides business and financial services for the department including budget development, accounts receivable, accounts payable, procurement and contracting, as well as administrative and general accounting support. The DCM/Non-D Human Resources Unit provides strategic HR services for the department and non-departmental work units.

Significant Changes

Significant changes for FY23 Include

- Creation of a Workforce Security Leadership Team focused on taking a strategic look at Countywide solutions to workplace violence.
- To better align resources with supervision, a Human Resources Analyst Senior position reporting to the DCM Equity Manager moved from DART Administration to the DCM Director's Office/COO.
- Program 72013 Capital Planning: provides funds to update and guide the County's future strategy for capital planning, prioritize infrastructure investments, and provide frameworks for long term asset management
- Program 72055 Contractor Capacity Review: funds a project to study, analyze, and provide recommendations to promote contractor wage equity, utilizing both short-term and long-term approaches to evaluate and recommend courses of action for state and local policy makers.
- Program 72056 Workplace Security: provide funds to plan, develop and implement a security program that offers high-level subject matter expertise and is a central point of contact for security matters across the County; to advise department leadership, COO and elected officials.
- Program 72057 Small Business Repair Fund East County: funds support for small businesses by covering the cost of vandalism up to \$5,000

Budget Office

The Budget Office (72001) guides the development of the budget process and facilitates the creation of the County's largest policy document. Through the budget process, the County aligns its funding with its priorities. This is why it's essential that the County's values are incorporated into the budget process. The Budget Office continues to evolve the budget process and documents to reflect that budgetary decisions should be centered on equity and has helped communicate this priority to the departments.

The Budget Office also provides a variety of resources and analyses to help inform decision makers and to guide departments through the budget process. For example, the Budget Office does the following:

- Creates General Fund forecasts to inform the Board how much funding is available for the budget;
- Performs analysis as needed throughout the year to determine the estimated cost impacts of departmental, local, State, or Federal policy proposals and changes;
- Provides cost estimates during labor negotiations;
- Provides budgetary information to departments during the annual budget process and throughout the fiscal year,
- Trains department employees on budget software and the budget process;
- Presents information about the budget process to external stakeholders such as community based organizations; and,
- Communicates policy direction and program priorities to departments.

The Evaluation and Research Unit (72014) is also part of this division. The Unit does research about workforce equity, employees' experiences, and evaluates programs both countywide and within the Department of County Management. The goal of this work is to ensure that County employees have the resources, support, and environment that they need to thrive as they do the important work to serve the community.

Significant Changes

There are no significant budgetary changes occurring within this division in FY 2023. To accommodate countywide transitions to hybrid or fully-remote workplaces, the Budget Office has expanded its communication efforts and methods to provide more email communications, live online trainings, and on-demand video trainings. The Budget Office also faces increasing demands for analysis and support related to the voter-approved initiatives for Metro Supportive Housing Services and Preschool for All, the Library General Obligation Bond, and American Rescue Plan funds. The Evaluation and Research Unit is working towards greater stakeholder engagement in its work in ways that model people-centered research and design and methods that embody principles of equity, safety, trust and belonging.

Finance and Risk Management

The Finance and Risk Management Division provides a wide variety of services to ensure the County's financial transactions are managed in a timely and accurate manner, and establishes policies and procedures that guide how those transactions are made by County departments.

The various units within the Division pay the County's bills, maintain and record accounting transactions, manage an investment portfolio that averages nearly \$669 million per day, and issue payroll checks. The Division is responsible for managing the County's debt obligations, ensuring that vendors who receive federal funding are in compliance with applicable rules, and provides oversight, and sets policy, for the County's contracting process. Risk Management negotiates insurance coverage for the County's buildings, manages claims associated with work-related injuries, consults on workplace safety and health, and manages claims for the County's self-insured liability program. ERP Support provides strategic and operational leadership and maintains, troubleshoots, and enhances Workday and Jaggaer enterprise system functionality.

Finance and Risk Management is responsible for preparing the County's Annual Comprehensive Financial Report, which has been awarded the Government Finance Officers Association (GFOA) award for distinguished reporting every year for the past 36 years. Staff members in the Division serve in leadership positions on statewide professional organizations and advisory boards. This honor reflects recognition by our peers of the ways Finance and Risk Management programs strive for innovative solutions.

Significant Changes

- Program 72005B FRM Purchasing - MMP Contracts + Optimization - Will focus on the optimization of the contracts module of Multco Marketplace, resolve legacy SAP contracts, create support and maintenance resources.
- Program 72008B FRM Motor Vehicle Tax - Limited Duration position will provide additional capacity for motor vehicle rental tax (MVRT) collection activities including audit and tax code enforcement.
- Program 72044B Regional Construction Workforce Diversity Funder Collaborative - This program funds the County's participation in a Regional effort to increase the diversity of the construction workforce.
- Program 72046B Expanded Workday Support Finance - 1.00 FTE was added to increase system reporting capacity and enhance departmental ERP system support. The position will develop specialized custom reports, implement Workday new reporting capabilities, support Data Mart Project, and support other major configuration projects.
- Programs 72052/72052B FRM Preschool for All Tax Administration - reduced by 1.00 FTE, effectively supported by one Project Manager and a tax consultant. The City of Portland tax administration fees are in Scaled B Program Offer.
- Program 72003B FRM Chief Financial Officer Admin Support - adds 1.00 FTE administrative support for the Office of the CFO and the FRM division
- Program 72005D FRM Purchasing- Contracting Redesign/Process Improvement- Adds one-time-only professional services.

Central Human Resources

The Central Human Resources Division (CHR) is driven by its strategic mission to: support the people who serve our community.

CHR provides strategic leadership, recommends policy, and partners with the department HR units to guide consistent, efficient and solutions-oriented HR processes and practices necessary to achieve results across the organization. CHR serves as an integral support of the Workforce Equity Strategic Plan (WESP) with a majority of the minimum standards requiring implementation capacity from CHR.

CHR manages the following services and systems: collective bargaining and labor contract interpretation; personnel rule and County HR policy development and interpretation; job profile & compensation plans; countywide training and organizational development; recruitment and retention systems and processes; employee benefits and wellness programs; oversight of HR systems and workforce data and management of the human capital management and payroll modules in Workday.

CHR prioritizes the processes and structures needed to strengthen the impact of HR within the organization. Overarching areas of priority include focusing on technology and business processes, equitable and inclusive practices, and diversity-focused recruitment and workforce development.

Significant Changes

- Program 72017B - Central HR Services - Recruiter Training Program adds capacity with four LDA HR Analyst 2 recruiters that will be trained centrally to be deployed in departments to help address recruitment backlogs.
- Program 72022B - HCM Workday Support Central HR funds a new HCM Workday position allowing for a restructuring of work across the HR Workday team, resulting in a more balanced workload for team members.
- Program 72051 - College to County Interns provides ongoing funding for 25 countywide intern positions
- Program 72053 - Workday Support - Review & Recommend is a one-time-only request to fund the Review and Recommend Project for one year.
- Program 72054 - HCM Workday Support Data Mart will allow for HR data in Workday to be extracted and used in external systems for comprehensive reporting not currently supported by Workday.
- Program 72901 - ARP Future of Work Coordinator & Space Planning, adds a limited duration HR Manager 1 for countywide planning for return to onsite work transition; and adds resources to develop and implement plans to reconfigure county facilities in response to updated programmatic needs for teleworking employees.

Division of Assessment, Recording and Taxation (DART)

The Division of Assessment, Recording and Taxation (DART) is responsible for funding and supporting the local community through administering property tax programs and maintaining vital and essential records for the county. On behalf of 65 taxing districts, DART maintains an accurate inventory and statutory value of approximately 315,000 property tax accounts for the purpose of generating correct property tax bills that fund these districts and their community priorities. Issuing marriage licenses and recording and indexing documents make up both vital and essential records under Oregon law. These are maintained for statutory purposes that follow rigorous guidelines to maintain an orderly identification of ownership of property and record of marriages. As a requirement under Oregon law, both must be maintained and archived indefinitely.

Significant Changes

DART's adaptation to the new work environment posed by adoption of telework policies that promote County business and process over an employee's desk location was a focus in FY 2022 and will continue into FY 2023. For the 13 programs within DART, affecting 137.50 FTE, each program is working to develop best practices and policies to support a hybrid workforce that continues to excel in customer service and community support. Technology adaptation is one significant challenge of this transition that will take years of planning to achieve and is well underway; however, team and program connection, collaboration, and communication are, in some cases, even more significant in challenging DART's future work environment and culture. Best practices to address these challenges are undertaken by engaging all stakeholders, ensuring adequate planning and consideration are used to develop best practices. As a result, DART has shifted some resources within general fund constraints to add 1.00 FTE and increase focus in support of a largely hybrid workforce model. This will continue into the 2023 fiscal budget cycle. To better align resources with supervision, a Human Resources Analyst Senior position reporting to the DCM Equity Manager moved from DART Administration to the DCM Director's Office/COO.

Department of County Management

The following table shows the programs that make up the department's total budget. The individual programs follow in numerical order.

Prog. #	Program Name	FY 2023 General Fund	Other Funds	Total Cost	FTE
DCM Director's Office					
72000A	DCM Director's Office / COO	\$1,611,179	\$0	\$1,611,179	6.00
72000B	DCM Director's Office - COO Professional Services	100,000	0	100,000	0.00
72013	Capital Planning	150,000	0	150,000	0.00
72015A	DCM Business Services	1,430,650	0	1,430,650	8.50
72049	DCM/NonD Human Resources Team	1,083,829	0	1,083,829	6.00
72055	Contractor Capacity Review	250,000	0	250,000	0.00
72056	Workplace Security	0	750,000	750,000	3.00
72057	Small Business Repair Fund East County	110,000	0	110,000	0.00
Budget Office					
72001	Budget Office	2,543,869	0	2,543,869	11.00
72014	Evaluation and Research Unit	578,193	0	578,193	3.00
Finance and Risk Management					
72002	FRM Accounts Payable	1,128,328	0	1,128,328	7.60
72003	FRM Chief Financial Officer	1,476,640	296,125	1,772,765	2.00
72003B	FRM Chief Financial Officer - Admin Support	95,000	0	95,000	1.00
72004	FRM General Ledger	1,168,164	0	1,168,164	7.00
72005A	FRM Purchasing	3,400,208	0	3,400,208	20.50
72005B	FRM Purchasing - MMP Contracts + Optimization	250,000	0	250,000	0.00
72005D	FRM Purchasing - Contracting Redesign/Process Improvement	140,000	0	140,000	0.00
72006	FRM Property & Liability Risk Management	0	6,376,792	6,376,792	2.50
72007	FRM Payroll/Retirement Services	1,257,688	0	1,257,688	7.40
72008A	FRM Treasury and Tax Administration	3,556,624	0	3,556,624	4.00
72008B	FRM Motor Vehicle Tax	175,000	0	175,000	0.00
72009	FRM Worker's Compensation/Safety & Health	0	4,444,083	4,444,083	8.00
72010	FRM Recreation Fund Payment to Metro	0	40,000	40,000	0.00
72012	FRM Fiscal Compliance	463,158	0	463,158	3.00
72044A	FRM Construction Diversity and Equity	215,000	0	215,000	0.00
72044B	Regional Construction Workforce Diversity Funder Collaborative	200,000	0	200,000	0.00

County Management

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Prog. #	Program Name	FY 2023 General Fund	Other Funds	Total Cost	FTE
Finance and Risk Management (continued)					
72046A	FRM Workday Support - Finance	999,157	0	999,157	4.00
72046B	FRM Expanded Workday Support - Finance	215,000	0	215,000	1.00
72047	FRM Labor Compliance	154,310	0	154,310	1.00
72048	FRM Clean Air Construction Standards	53,450	0	53,450	0.00
72052	FRM Preschool for All Tax Administration - County	0	203,563	203,563	1.00
72052B	FRM Preschool for All Tax Administration - City of Portland	0	7,175,541	7,175,541	0.00
Central Human Resources					
72016A	Central HR Administration	1,161,845	0	1,161,845	2.63
72017A	Central HR Services	3,013,090	0	3,013,090	14.00
72017B	Recruiter Training & Capacity Building	622,000	0	622,000	0.00
72018A	Central HR Labor Relations	1,023,376	59,197	1,082,573	4.85
72019	Central HR Unemployment	0	1,011,821	1,011,821	0.15
72020	Central HR Employee Benefits & Wellness	0	152,009,404	152,009,404	13.37
72022A	Workday Support - Central Human Resources	1,938,564	0	1,938,564	9.00
72022B	HCM Expanded Workday Support	216,717	0	216,717	1.00
72050	Central HR Classification & Compensation	582,893	0	582,893	3.00
72051	College to County Interns	300,000	0	300,000	0.00
72053	Workday Support - Review & Recommend	1,000,000	0	1,000,000	0.00
72054	HCM Workday Support Data Mart	215,000	0	215,000	0.00
Division of Assessment, Recording and Taxation (DART)					
72023	Div of Assessment, Recording & Taxation Administration	754,947	0	754,947	2.40
72024	DART Customer Service	1,737,943	0	1,737,943	11.45
72025	DART County Clerk Functions	1,933,289	0	1,933,289	12.05
72026	DART Ownership & Parcel Management	933,052	0	933,052	7.60
72027	DART Tax Revenue Management	2,419,105	0	2,419,105	13.40
72028	DART GIS/Cartography	912,793	0	912,793	5.25
72029	DART Assessment Performance Analysis	631,391	0	631,391	3.25
72030	DART Property Assessment Special Programs	1,220,460	0	1,220,460	8.25
72031	DART Personal Property Assessment	1,016,439	0	1,016,439	6.00
72033	DART Commercial & Industrial Property Appraisal	3,996,217	0	3,996,217	23.50

County Management

fy2023 adopted budget

Prog. #	Program Name	FY 2023 General Fund	Other Funds	Total Cost	FTE
Division of Assessment, Recording and Taxation (DART)(continued)					
72034	DART Residential Property Appraisal	5,844,677	0	5,844,677	36.50
72037	DART Applications Support	1,733,677	0	1,733,677	6.25
72038	DART Tax Title	750,197	0	750,197	1.60
COVID-19 & American Rescue Plan					
72900	ARP - Federal Grant Compliance and Monitoring	0	160,000	160,000	0.00
72901	ARP - Future of Work Coordinator and Space Planning	0	2,705,000	2,705,000	0.00
72902	ARP - Labor Relations Expanded Support	<u>0</u>	<u>235,000</u>	<u>235,000</u>	<u>0.00</u>
Total County Management		\$56,763,119	\$175,466,526	\$232,229,645	293.00

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Department: County Management

Program Contact: Serena Cruz

Program Offer Type: Administration

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Director's Office includes the DCM Department Director / Chief Operating Officer combined positions. The COO/Director role manages the organizational health of Multnomah County and sets administrative policy. Areas of countywide responsibility include budget, finance, human resources, property assessments & recording, tax collections, emergency management and protected class complaints. The COO provides countywide oversight through the supervision of the appointed department directors for the Health Department, Department of Community Justice, Library, Department of County Human Services, Department of County Assets, and Department of Community Services.

Program Summary

The COO's office works with the County Chair, Board of County Commissioners, department directors and DCM division directors to set countywide priorities and ensure that County policies are upheld. The Office works with the Chief Financial Officer, Budget Director, and Chief Human Resources Officer to develop and present administrative, financial, human resource and infrastructure guidelines and policies to the County Chair, the Board of County Commissioners (Board), and department directors.

The Office of the COO/DCM Director works with departments and human resource personnel to recruit, train and retain a diverse workforce; provides management for county-wide projects and initiatives; and serves as the supervisor for all department directors. In FY 23, the Director's Office will continue to focus on sustaining and continuing to implement the countywide and department's Workforce Equity Strategic Plan (WESP), leadership development for County managers and supervisors, and workforce security.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	DCM all manager and supervisor professional development events held.	2	4	2	2
Outcome	Percent of DCM WESP initiatives implemented and sustained.	100%	90%	100%	90%
Output	Number of DCM specific new employee orientation events held.	4	4	4	4
Output	Number of countywide monthly newsletters published for managers and supervisors.	12	12	12	12

Performance Measures Descriptions

Output: COVID-19 impacted manager and supervisor professional development events as we allocated the time and resources for all-staff meetings and communications to keep staff informed of our ever-changing environment. The performance measures all lead towards the department's desire to create a culture of Safety, Trust and Belonging for its workforce.

Legal / Contractual Obligation

ORS 208, 238, 288, 294, 295, 310 and many other Oregon Revised Statutes, Multnomah County Code, Chapters 7, 9, 11 and 12 and County Charter requires the county to maintain appropriate personnel, infrastructure, taxation and financial system operations.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,199,059	\$0	\$1,402,709	\$0
Contractual Services	\$130,000	\$0	\$147,000	\$0
Materials & Supplies	\$18,810	\$0	\$18,810	\$0
Internal Services	\$32,388	\$0	\$42,660	\$0
Total GF/non-GF	\$1,380,257	\$0	\$1,611,179	\$0
Program Total:	\$1,380,257		\$1,611,179	
Program FTE	5.00	0.00	6.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund Revenues

Significant Program Changes

Last Year this program was: FY 2022: 72000A DCM Director's Office

To better align resources with supervision, a Human Resources Analyst Senior position reporting to the DCM Equity Manager moved from DART (72023) to the Director's Office (and is now position 742067).

Legal / Contractual Obligation

N/A

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$0	\$100,000	\$0
Total GF/non-GF	\$0	\$0	\$100,000	\$0
Program Total:	\$0		\$100,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Supported by General Fund revenue. \$50K is Ongoing, and \$50K is One-Time-Only

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Christian Elkin
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Budget Office, under the leadership of the Chair and Board of County Commissioners, manages the County's budget process and prepares the annual budget. The office serves as a resource to the Chair's Office, the Board of County Commissioners, other elected officials, County departments, and the public. It also helps decision makers and department staff by communicating policy direction and program priorities; coordinating strategic planning; and providing technical expertise, training, and various analyses.

Program Summary

The budget is more than just a list of the planned revenues and expenses for the fiscal year. The budget is the County's largest policy document, and it is through the budget process that the County aligns its funding with its priorities. This is why it's essential that the County's values are incorporated into the budget process. The Budget Office supports this work by facilitating the countywide budget process. For example, one of the main priorities of the Chair, Board, and County is to focus on equity. The Budget Office has updated the budget process and documents to reflect that budgetary decisions should be centered on equity and has helped communicate this priority to the departments.

The Budget Office also provides a variety of resources and analyses to help inform decision makers and to guide departments through the budget process. For example, the Budget Office does the following:

- Creates General Fund forecasts to inform the Board how much funding is available for the budget (the General Fund is the County's largest source of discretionary revenues; if the forecast is too high, a midyear reduction may be required, but if it is too low, the County may unnecessarily cut services or employees during the annual process),
- Performs analysis as needed throughout the year to determine the estimated cost impacts of departmental, local, State, or Federal policy proposals and changes,
- Provides cost estimates during labor negotiations,
- Provides budgetary information to departments during the annual budget process and throughout the fiscal year,
- Trains department employees on budget software and the budget process,
- Presents information about the budget process to external stakeholders such as community based organizations, and
- Communicates policy direction and program priorities to departments.

The Budget Office also helps ensure that the County follows Oregon budget law. The County is committed to producing a high quality budget that follows recommended guidelines and best practices. This is reflected in the fact that the County has received the Government Finance Officers Association's Distinguished Budget Presentation Award for almost two decades.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of budget modifications processed (includes internal)	208	200	259	200
Outcome	% of budget modifications entered into Workday within 4 weeks of Board approval	88%	98%	88%	90%
Quality	Percent error in General Fund Revenue Forecast	7.5%	2.0%	6.4%	2.0%
Quality	Customer rating of countywide budget process on scale of 1 to 10 (extremely dissatisfied to extremely satisfied)	6.66	N/A	7.22	7.25

Performance Measures Descriptions

Budget modifications make changes after the fiscal year begins; most need Board approval, but purely technical changes are "internal" and only need Budget Office approval. The forecast error in FY 2021 and FY 2022 is significantly higher than usual due to the quick rebound of the Business Income Tax (BIT) after the economic shock from the pandemic. Customer rating: New due to change in budget survey questions. Because of survey timing, the FY 2022 estimate is the actual rating. (Previous measure of "% of customers rating Budget Office efforts as either 'good' or 'excellent'" was 84% in FY 2021).

Legal / Contractual Obligation

The Budget Office is not mandated, but the County is subject to Oregon Budget Law (ORS Chapter 294). The office is responsible for producing a financially sound budget that complies with the law and communicates the anticipated outcomes from use of public funds entrusted to the County.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,963,207	\$0	\$2,182,628	\$0
Contractual Services	\$30,159	\$0	\$30,159	\$0
Materials & Supplies	\$96,784	\$0	\$96,784	\$0
Internal Services	\$231,734	\$0	\$234,298	\$0
Total GF/non-GF	\$2,321,884	\$0	\$2,543,869	\$0
Program Total:	\$2,321,884		\$2,543,869	
Program FTE	11.00	0.00	11.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Significant Program Changes

Last Year this program was: FY 2022: 72001 Budget Office

The office has transitioned to a hybrid workplace with staff spending some days in the office and other days teleworking. To accommodate countywide transitions to hybrid or fully-remote workplaces, the Budget Office has also expanded its communication efforts and methods, including instituting a regular Budget Bulletin covering time-sensitive issues, providing live online trainings related to the budget process and budget software, and developing numerous video trainings available when most convenient for departmental users (supplementing already-existing written materials). The Budget Office is also engaging in economic forecasting support related to the voter-approved initiatives for Metro Supportive Housing Services and Preschool for All; as well as, additional analysis related to those programs, the Library General Obligation Bond, and American Rescue Plan funds.

Legal / Contractual Obligation

Tax Information Returns (i.e. 1099 MISC, 1099 INT, etc.) are mandated by the Internal Revenue Service code as described in Sections 1.6001-1 through 1.6091-4. Failure to comply would result in the County being assessed penalties and fines.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,067,067	\$0	\$1,117,954	\$0
Contractual Services	\$1,950	\$0	\$1,950	\$0
Materials & Supplies	\$8,424	\$0	\$8,424	\$0
Total GF/non-GF	\$1,077,441	\$0	\$1,128,328	\$0
Program Total:	\$1,077,441		\$1,128,328	
Program FTE	7.60	0.00	7.60	0.00

Program Revenues				
Other / Miscellaneous	\$291,180	\$0	\$300,180	\$0
Total Revenue	\$291,180	\$0	\$300,180	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Rebates are the only Central Accounts Payable revenue. Rebates, received from U.S. Bank and Bank of America, are based on the level of annual spending in each of the bank's credit card programs. The majority is from Bank of America's purchasing card program; rebates from BOA are generally 1.4% of total value of transactions processed annually. Where practical, Multnomah County maximizes the use of electronic card payments to leverage rebates back to the County.

Significant Program Changes

Last Year this program was: FY 2022: 72002 FRM Accounts Payable

Department: County Management

Program Contact: Eric Arellano

Program Offer Type: Administration

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:
Executive Summary

The Chief Financial Officer manages the financial health of the entire County and sets administrative policy related to financial management. Direct responsibilities include Accounts Payable, ERP Finance Support, General Ledger, Fiscal Compliance, Risk Management, Payroll, Retirement Programs, Excise Tax Administration, Central Purchasing and Treasury.

Program Summary

The Chief Financial Officer (CFO) develops and presents financial guidelines to executive level staff, the County Chair's Office, and the Board of County Commissioners. The CFO presents recommendations related to public financial policy to these groups as well as other jurisdictions. The CFO interacts with the Oregon Legislature, the general public, and the business community in assessing the potential impact of changes in financial policy. The CFO also develops and/or suggests financing alternatives to executive level staff and jurisdiction partners.

The CFO monitors the Public Employees Retirement System (PERS) and works with partner jurisdictions to develop and present legislative policy. This involves communication with the Board, the Oregon Legislature and/or PERS Board and labor groups. The CFO works with the Budget Office, the Chair's Office, the Board and County departments to establish priorities and guidelines, and ensures that policies are aligned with these priorities. The CFO works with departmental finance sections, DCM divisions, and all County department stakeholders on all administrative policies and procedures.

The CFO manages the County's risk fund, this includes but is not limited to managing risk fund budget, setting collection rates, managing/setting reserve requirements (e.g. workers compensation and health self insured programs), managing other post retirement employment benefits (OPEB) program, and managing the usage of the fund.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Annual Comprehensive Financial Report is issued according to legal requirements	1	1	1	1
Outcome	Maintain County's high bond rating of Aaa	1	1	1	1

Performance Measures Descriptions

The Annual Comprehensive Financial Report is a primary product of the Finance Division. Statutes require that it is issued within six months of the close of the fiscal year. 1=achieved; 0=not achieved.

County maintains the highest bond rating of Aaa on general obligation debt. This rating is achieved by continuing to demonstrate prudent financial management. 1=achieved; 0=not achieved.

Legal / Contractual Obligation

Several financial functions laid out in Oregon Revised Statutes and County Code are directly and indirectly the responsibility of the Chief Financial Officer.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$390,885	\$82,447	\$450,426	\$100,562
Contractual Services	\$31,500	\$0	\$41,000	\$0
Materials & Supplies	\$14,384	\$0	\$14,384	\$0
Internal Services	\$871,808	\$187,896	\$970,830	\$195,563
Total GF/non-GF	\$1,308,577	\$270,343	\$1,476,640	\$296,125
Program Total:	\$1,578,920		\$1,772,765	
Program FTE	1.65	0.35	1.65	0.35

Program Revenues				
Other / Miscellaneous	\$0	\$270,343	\$0	\$296,125
Total Revenue	\$0	\$270,343	\$0	\$296,125

Explanation of Revenues

This program is supported by General Fund and Risk Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72003 FRM Chief Financial Officer

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$92,873	\$0
Materials & Supplies	\$0	\$0	\$2,127	\$0
Total GF/non-GF	\$0	\$0	\$95,000	\$0
Program Total:	\$0		\$95,000	
Program FTE	0.00	0.00	1.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund

Significant Program Changes

Last Year this program was:

Legal / Contractual Obligation

Oregon Revised Statutes (ORS), Ch. 297: Audits of Public Funds and Financial Records, requires governments to have an external audit and that it be submitted to the Secretary of State - Audits Division.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,089,581	\$0	\$1,154,264	\$0
Contractual Services	\$2,000	\$0	\$2,000	\$0
Materials & Supplies	\$11,900	\$0	\$11,900	\$0
Total GF/non-GF	\$1,103,481	\$0	\$1,168,164	\$0
Program Total:	\$1,103,481		\$1,168,164	
Program FTE	7.00	0.00	7.00	0.00

Program Revenues				
Service Charges	\$20,000	\$0	\$20,000	\$0
Total Revenue	\$20,000	\$0	\$20,000	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

External revenue is received from the County's separately issued component unit financial reports: Mid County Service District No. 14, Dunthorpe-Riverdale Service District No. 1, and the Multnomah County Library District. The revenues are a reimbursement for central accounting and reporting services provided to each component unit.

Significant Program Changes

Last Year this program was: FY 2022: 72004 FRM General Ledger

Department: County Management **Program Contact:** Brian Smith
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs: 72044, 72047, 72048
Program Characteristics:

Executive Summary

Purchasing oversees the County's goods and services procurement activities and provides leadership, expertise, and training to employees who perform purchasing functions. Purchasing supports departments to procure products and services in construction, materials, and both non-professional and professional services. Purchasing ensures appropriate and cost-efficient public procurement and contracting practices, including evaluating the economic, social, and environmental impacts of purchases.

Program Summary

Purchasing provides leadership, policy oversight and monitoring, contract procurement, compliance, staff training, support services and overall accountability for several thousand contracts and hundreds of millions of dollars awarded each year.

Key efforts include the following: (1) safeguard the County from potential contractual risk and liability exposure; (2) functional administration of the County's procurement and contracting software; (3) ensure products and services are purchased in accordance with federal and state laws, procedures and regulations including County Administrative Procedures and rules established by Multnomah County's Public Contract Review Board (PCRB); (4) review and approve contract documents, review and approve contract changes and/or amendments and maintain official contract records; (5) research, analyze, recommend, and implement best business practices; (6) provide ongoing public purchasing guidance, support, training, and consultation to departments and employees; (7) track, monitor, analyze and annually report on contract data and performance measures; (8) maximize efforts to include and ensure participation of State Certification Office for Business Inclusion and Diversity (COBID) Certified suppliers (Disadvantaged Business Enterprises, Minority-owned, Women-owned, Service Disabled-owned and Emerging Small Businesses) and Qualified Rehabilitation Facilities (QRF); (9) participate in community events, meetings and conduct outreach to the COBID Certified supplier community and; (10) develop and implement sustainable purchasing policies, procedures and training.

Purchasing promotes the County's sustainability goals by ensuring sustainable practices of prospective suppliers, contractors and service providers are included as evaluation criteria in all contract awards over \$10,000. All Purchasing staff share in the education, training, and support of County staff to ensure sustainable purchasing practices.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Percent of contracts awarded to COBID Certified and QRF businesses	7%	8%	10%	8%
Outcome	Number of sustained protest on formal procurements	0	0	0	0
Output	Number of formal RFP and Bid solicitations issued	47	120	62	80
Output	Number of contracts and amendments processed	1020	1,000	1276	1,000

Performance Measures Descriptions

Purchasing manages formal Request For Proposal (RFP) and bid solicitations (>\$150,000) for the County because those represent the greatest risk in the County's purchasing activity. Minimizing the number of sustained protests is an indicator of how well Purchasing is managing the risks associated with formal procurement processes. The output measures listed are good indicators of the volume of formal procurements we conduct and the contract processing activity across all County departments.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) 279A, 279B, and 279C establish requirements affecting the County's procurement and contracting practices. The County establishes and implements Public Contract Review Board (PCRB) Rules and Administrative Procedures CON-1 and PUR-1 to define its procurement and contracting processes within the constraints of ORS requirements.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$3,071,589	\$0	\$3,249,190	\$0
Contractual Services	\$11,146	\$0	\$11,146	\$0
Materials & Supplies	\$131,968	\$0	\$139,872	\$0
Total GF/non-GF	\$3,214,703	\$0	\$3,400,208	\$0
Program Total:	\$3,214,703		\$3,400,208	
Program FTE	20.50	0.00	20.50	0.00

Program Revenues				
Other / Miscellaneous	\$2,000	\$0	\$2,000	\$0
Total Revenue	\$2,000	\$0	\$2,000	\$0

Explanation of Revenues

This program is primarily supported by General Fund revenues.

External revenues are generated primarily when fees are collected for services performed in response to public records requests.

Significant Program Changes

Last Year this program was: FY 2022: 72005 FRM Purchasing

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) 279A, 279B, and 279C establish requirements affecting the County's procurement and contracting practices. The County establishes and implements Public Contract Review Board (PCRB) Rules and Administrative Procedures CON-1 and PUR-1 to define its procurement and contracting processes within the constraints of ORS requirements. MMP is the County's system of record that contains the records to demonstrate compliance with these laws.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$75,000	\$0
Contractual Services	\$0	\$0	\$175,000	\$0
Total GF/non-GF	\$0	\$0	\$250,000	\$0
Program Total:	\$0		\$250,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is funded through General Fund revenues.

Significant Program Changes

Last Year this program was:

Department: County Management

Program Contact: Brian Smith

Program Offer Type: Innovative/New Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

This program provides funding to work with a contractor to identify opportunities for further improvements in the County's contracting systems. Implementation will include baseline education about the current operation of procurement and contracting functions at the County followed by a clarifying scope of work for a contractor to assist with addressing the most impactful contracting system improvements.

Program Summary

In 2008, the County Auditor issued audits addressing how the County managed its large human services contracts and provided specific recommendations for improvements. This was followed in January 2008 with a Board Resolution to evaluate County contracting process and make recommendations for improvements. Significant progress was subsequently made in redesigning the County's entire procurement and contracting system, including the implementation and subsequent replacement of an ERP to support procurement and contracting business processes. This Contract System Redesign included clarifying roles and responsibilities, as well as development and initial delivery of contract administration tools and training that covered: planning, risk management, performance measurement, monitoring, and sanctions. While our County contracting has improved over the years and has been recognized for excellence, there is still work to be done to improve contract administration and work towards even greater accountability, consistency, and responsible management of taxpayer dollars.

As a follow up activity to the investments previously made, DCM will provide an overview to the Board of the current procurement and contracting functions at Multnomah County including an update on how the County responded to the items specified in the 2008 audit and subsequent reports. With this background and understanding, we will highlight places where there are opportunities to improve system transparency and functionality. Funding from this program will be used by the COO and DCM to engage contracted expertise to highlight opportunities and develop recommendations that will focus on bringing the most pressing system improvements to the counties contracting activities.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Report updating the County's implementation of previous Audit recommendations.	N/A	N/A	N/A	1
Outcome	Delivery of actionable recommendations	N/A	N/A	N/A	1

Performance Measures Descriptions

1=achieved; 0=not achieved.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$0	\$140,000	\$0
Total GF/non-GF	\$0	\$0	\$140,000	\$0
Program Total:	\$0		\$140,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is funded with one-time-only General Fund

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Michelle Cross
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs: 72009B
Program Characteristics:

Executive Summary

The Property & Liability Risk Program (P&LRP) manages the County's property and liability risks in accordance with all legal requirements and County policies/procedures. It focuses on countywide risk exposures, liability/subrogation claims, property claims, purchasing insurance, loss control/prevention, and assists departments in managing identified risks.

Program Summary

The (P&LRP) purchases property insurance, marine coverage, crime coverage, excess liability, excess medical malpractice coverage, bonds, and other specialized insurance coverage for the County. Where the cost of insurance prohibits purchase or coverage is not available, we self fund losses. The P&LRP recommends the types/limits of insurance for contracts, recommends the purchase of specialized insurance and develops countywide policies and procedures related to loss prevention and control. The P&LRP designs and implements risk management strategies for the prevention of risk exposure and property and liability loss countywide. The program adjusts property loss claims, and oversees the Third Party Administrator contracted to process general liability insurance claims for the County. Litigation and large general liability insurance claims are settled with expertise from the County Attorney's Office. The County chooses to "self-insure" (retain a certain amount of financial exposure to loss) and purchases property and excess liability coverage for large property and liability related claims. This decision controls the loss adjustment process, minimizes our "total cost of risk" (uninsured claims costs + insurance costs + administrative costs), and motivates internal loss control behavior. A department's internal property and liability allocated charges are based on their past losses using actuarial data and historical loss data to determine cost percentage rates based on anticipated future losses. This process allows for equitable distribution of financial losses.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of policies for insured risks and statutory bond purchased/renewed*	17	18	19	21
Outcome	Resolve and optimize reimbursement for insured loss**	N/A	N/A	0	1

Performance Measures Descriptions

*Appropriate types of insurance coverage indicate strong safeguarding of the county's assets.

**Maximize reimbursable for insured damage repair due to 2020 protests (0-Not Met, 1-Goal Met)

Legal / Contractual Obligation

The Property & Liability Risk Program is mandated by County Code 7.100-7.104. The County is required by the State to have specific insurance and bond coverage. The County is self-insured for third-party liability in accordance with the provisions of the Oregon Tort Claims Act, ORS 30.270 and purchases Excess General Liability insurance above the self-insured retention of \$1,000,000. The required Public Official Bonds, DEQ Bonds, and Pharmacy Bond are purchased in accordance with State requirements.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$407,098	\$0	\$423,112
Contractual Services	\$0	\$270,200	\$0	\$304,975
Materials & Supplies	\$0	\$5,084,485	\$0	\$5,648,705
Total GF/non-GF	\$0	\$5,761,783	\$0	\$6,376,792
Program Total:	\$5,761,783		\$6,376,792	
Program FTE	0.00	2.50	0.00	2.50

Program Revenues				
Other / Miscellaneous	\$0	\$5,821,768	\$0	\$7,040,126
Total Revenue	\$0	\$5,821,768	\$0	\$7,040,126

Explanation of Revenues

Departments are charged a risk property & liability rate based on claims experience and an actuarial valuation performed every three years. The P&LRP also receives subrogation money and reimbursement related to liability claims.

Significant Program Changes

Last Year this program was: FY 2022: 72006 FRM Property & Liability Risk Management

Legal / Contractual Obligation

Wage payments are mandated by Federal & State wage and hour laws, union contracts, and Multnomah County Personnel Rules. Withholding and remitting employment taxes is mandated by the Internal Revenue Service, the Oregon Dept of Revenue and other state tax agencies. Pension contributions are mandated by union contracts, Multnomah County Personnel Rules and Oregon Revised Statutes. Failure to comply with these laws and regulations result in fines and penalties being assessed.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,063,110	\$0	\$1,147,640	\$0
Contractual Services	\$85,855	\$0	\$86,355	\$0
Materials & Supplies	\$23,268	\$0	\$23,693	\$0
Total GF/non-GF	\$1,172,233	\$0	\$1,257,688	\$0
Program Total:	\$1,172,233		\$1,257,688	
Program FTE	7.40	0.00	7.40	0.00

Program Revenues				
Other / Miscellaneous	\$183,053	\$0	\$208,053	\$0
Beginning Working Capital	\$50,000	\$0	\$35,000	\$0
Total Revenue	\$233,053	\$0	\$243,053	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

External revenues for the deferred compensation program are contractually negotiated with the County's deferred compensation provider through a revenue sharing agreement. All administrative costs associated with the program are paid for through the agreement. The revenue sharing enables the County to offer the program to employees at no cost to the County. The estimated reimbursement for FY 2023 is \$180,000 and is adjusted each following year by the CPI-W. In addition \$35,000 of BWC from FY 2022 is budgeted.

Significant Program Changes

Last Year this program was: FY 2022: 72007 FRM Payroll/Retirement Services

Department: County Management **Program Contact:** Eric Arellano
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Treasury manages the County's cash assets, investment portfolio, debt, banking services and relationships and broker/dealer relationships. Treasury also manages the Excise Tax Administration program which includes management of revenue collections for Motor Vehicle Rental Tax (MVRT), Transient Lodging Tax (TLT) and Business Income Tax (BIT) in accordance with Multnomah County Code, the County's fiduciary responsibilities and revenue & taxation policies and procedures.

Program Summary

Treasury invests the County's financial assets to ensure that funds are available to meet anticipated cash flow needs. Investment earnings are measured against specific benchmarks outlined in the Investment Policy. Treasury complies with all applicable laws, policies and best practices in the management of County funds.

Treasury supports the Chief Financial Officer in the issuance of debt, including opportunities to refinance existing debt and maintains contact with rating agencies. It ensures timely and accurate debt service payments and generates arbitrage rebate calculations and reports. Treasury regularly analyzes cash flow. From time to time it is necessary to issue short term Tax and Revenue Anticipation Notes (TRANS) to provide liquidity prior to the collection of property taxes in November.

The County collects and administers three excise taxes. A Business Income Tax (BIT) is assessed against businesses with income generated within the County. It is set at a rate of 2.00% of net income. BIT is the second largest revenue source in the General Fund, generating approximately 22% of General Fund revenues. A Motor Vehicle Rental Tax (MVRT) is charged on the rental of cars and light trucks within the County. It is currently set at a rate of 17% of rental fees. A portion of the tax (2.5%) is passed through to the Visitors Development Fund to support tourist activities. A Transient Lodging Tax (TLT) is charged on the rental of hotel/motel rooms within the County. It is currently set at a rate of 11.5% of rental fees. Most of the revenue generated by the TLT is passed through to other entities. Cities retain 6%, another 3% is dedicated to operating the Oregon Convention Center, and 2.5% is passed through to the Visitors Development Fund.

Treasury provides countywide accounts receivable oversight and management including AR aging monitoring, cash management, and collection activities. Treasury maintains effective banking relationships to keep pace with technology and adapt to the needs of County Departments in delivering business services to County residents.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Compliance with Investment Policy*	1	1	1	1
Outcome	Tax Returns Filed-Motor Vehicle and Transient Lodging**	2,890	2,300	2,990	3,030
Outcome	Ensure County's Cash Flow Needs are Met***	1	1	1	1
Output	Number of Active Business Accounts in County****	185,000	108,000	186,500	186,700

Performance Measures Descriptions

*Measurement Key: 1 = Goal Achieved, 0 = Not Achieved (ensures compliance to applicable ORS)

**The number of tax returns filed is a measure of compliance with applicable code requirements.

***Measurement Key: 1 = Goal Achieved, 0 = Not Achieved (ensures County meets its debt obligations)

****The number of business accounts is used as a workload measure and serves as an indicator of economic activity within the County.

Legal / Contractual Obligation

Oregon Revised Statutes ORS 294 and 295 (primarily ORS 294.035), Multnomah County Code Chapter 12 (BIT) and Chapter 11 (MVRT and TLT). The Business Income Tax is administered by the City of Portland through an intergovernmental agreement (IGA) that expires at the end of FY 2030

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$596,110	\$0	\$637,633	\$0
Contractual Services	\$2,997,653	\$0	\$2,904,561	\$0
Materials & Supplies	\$13,950	\$0	\$14,430	\$0
Total GF/non-GF	\$3,607,713	\$0	\$3,556,624	\$0
Program Total:	\$3,607,713		\$3,556,624	
Program FTE	4.00	0.00	4.00	0.00

Program Revenues				
Interest	\$120,000	\$0	\$120,000	\$0
Service Charges	\$115,000	\$0	\$145,281	\$0
Total Revenue	\$235,000	\$0	\$265,281	\$0

Explanation of Revenues

External revenue is received through an agreement between the County and the Visitors Development Fund Board. Under terms of the IGA that created the Visitors Development Fund the County receives an administrative fee equal to 0.7% of MVRT and TLT revenues recorded in the fund.

Investment earnings from the investment portfolio are allocated to this program to cover administrative fees for non-discretionary investment advisory services.

Significant Program Changes

Last Year this program was: FY 2022: 72008A FRM Treasury and Tax Administration

Legal / Contractual Obligation

Oregon Revised Statutes ORS 294 and 295 (primarily ORS 294.035), Multnomah County Code Chapter 12 (BIT) and Chapter 11.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$159,527	\$0
Materials & Supplies	\$0	\$0	\$15,473	\$0
Total GF/non-GF	\$0	\$0	\$175,000	\$0
Program Total:	\$0		\$175,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Taxes	\$0	\$0	\$175,000	\$0
Total Revenue	\$0	\$0	\$175,000	\$0

Explanation of Revenues

This program is supported by additional Motor Vehicle Rental Tax Revenues.

Significant Program Changes

Last Year this program was:

Legal / Contractual Obligation

MCC 7.102 and 7.103 establishes the safety and loss prevention program in the County. The Oregon Safe Employment Act, ORS 654, establishes minimum safety standards for employers. Oregon OSHA, as outlined in OAR 437-001-1005 through 1020 and 1050 through 1060, requires each self-insured employer to have a written loss prevention plan for each location and to provide safety and health loss prevention services for each work site.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$1,247,905	\$0	\$1,311,504
Contractual Services	\$0	\$420,150	\$0	\$513,150
Materials & Supplies	\$0	\$2,512,129	\$0	\$2,619,429
Total GF/non-GF	\$0	\$4,180,184	\$0	\$4,444,083
Program Total:	\$4,180,184		\$4,444,083	
Program FTE	0.00	8.00	0.00	8.00

Program Revenues				
Other / Miscellaneous	\$0	\$4,120,199	\$0	\$4,380,749
Total Revenue	\$0	\$4,120,199	\$0	\$4,380,749

Explanation of Revenues

The Workers' Compensation Section receives reimbursement from the State of Oregon for claims cost when specific eligibility criteria are met. Claim processing over payment reimbursements are also received as revenue. Safety and Health receives internal service reimbursements from departments whose staff attend the first aid/CPR/AED classes taught by Safety and Health instructors. The revenues received are to offset the cost paid to the Medic First Aid for course materials and completion certificates. The cost to Departments/Offices whose staff attend these internal classes are well below the cost of taking the class from an external provider.

Significant Program Changes

Last Year this program was: FY 2022: 72009A FRM Worker's Compensation/Safety & Health

Legal / Contractual Obligation

Pass-through payment under terms of the IGA that transferred parks from the County to Metro.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$50,000	\$0	\$40,000
Total GF/non-GF	\$0	\$50,000	\$0	\$40,000
Program Total:	\$50,000		\$40,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Taxes	\$0	\$50,000	\$0	\$40,000
Total Revenue	\$0	\$50,000	\$0	\$40,000

Explanation of Revenues

Revenues represent Multnomah County's share of State Marine Fuel Tax.

Significant Program Changes

Last Year this program was: FY 2022: 72010 FRM Recreation Fund Payment to Metro

Department: County Management

Program Contact: Cora Bell

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Fiscal Compliance is responsible for maintaining compliance with Federal, State and County laws and regulations and to provide fiscal oversight of contracted programs. The unit performs pre-award risk assessments, site reviews and financial statement analyses on County human service contracts to meet that responsibility. The unit manages the County's annual Single Audit (audit of the County's federal expenditures) and provides countywide grant management policy development, guidance, and support to County departments.

Program Summary

Fiscal Compliance performs annual fiscal monitoring for all CBO's that work with the County. Monitoring includes, financial statement analysis including cash flow and revenue reliance for all CBO's, and site and desk reviews for those receiving Federal funding. Site reviews include internal control, compliance and accuracy testing. Fiscal Compliance provides recommendations to align with best practices.

Fiscal Compliance performs annual risk assessments (which includes a financial statement review) on all contracts receiving Federal funds to ensure compliance with external standards/regulations and assesses the entities financial health. In the most recent year, Fiscal Compliance performed 55 risk assessments and performed 20 site audits covering \$6.5 million in federal expenditures. The performed oversight helps department programmatic staff with transparency into fiscal assessments by ensuring subrecipients are compliant with grant requirements and are financially stable.

Fiscal Compliance also offers both external and internal support around compliance. Internal support includes, but not limited, to approval of costing allocations, reviewing CBO budgets, and providing guidance for external audits. External support for our CBO's includes, but isn't limited to, review of internal controls for fiscal recommendations, review of indirect rates and costing allocations, and invoice reviews.

Fiscal Compliance manages and coordinates the annual Single Audit for the County. The program also administers the County's fiscal grants management user group which supports County grants administration, grants policy, and grant compliance efforts. Fiscal Compliance prepares the County's Cost Allocation Plan annually to set indirect rates, overhead costs in support of grants and contracts.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Total risk assessments performed on County contracts receiving Federal funds	69	50	60	50
Outcome	Percent of total County pass-through dollars actively monitored by Fiscal Compliance	75%	85%	90%	85%

Performance Measures Descriptions

The Fiscal Compliance unit performs financial monitoring of County-funded human service providers. Monitoring includes Federal, State, County and other funds recorded in the pass-through/program support GL account. A higher percentage/count monitored indicates greater coverage and decreased County financial risk as it relates to human services providers.

Legal / Contractual Obligation

The Office of Management and Budget (OMB) Federal Register requires entities expending Federal funds over \$750,000 in a fiscal year to have a single audit of Federal awards. Also, according to the Federal Register, Federal funds that are passed on to other organizations (such as non-profits) must perform subrecipient monitoring on those contracts funded with pass-through dollars. The Federal Register requires organizations to publish an approved indirect cost allocation plan for any indirect or administrative costs allocated to Federal awards.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$434,666	\$0	\$459,778	\$0
Materials & Supplies	\$3,380	\$0	\$3,380	\$0
Total GF/non-GF	\$438,046	\$0	\$463,158	\$0
Program Total:	\$438,046		\$463,158	
Program FTE	3.00	0.00	3.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72012 FRM Fiscal Compliance

Department: County Management **Program Contact:** Serena Cruz
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

The purpose of the Capital Planning Program is to update and guide the County's future strategy for capital planning. It will include an analysis of investments in transportation, facilities, property management and information technology assets to determine the best way to strategically manage the assets on an ongoing basis. The long term strategic capital plan will allow the County to evaluate and prioritize infrastructure investments based on the County's operation and community needs, values, debt capacity, and financial ability. It will also provide critical frameworks for long term asset management of existing infrastructure.

Program Summary

To ensure the effective management of capital assets, the Government Finance Officers Association (GFOA) recommends that local governments prepare long term capital plans outlining major infrastructure investments and forecasting the impact on operating budgets. This program will evaluate and update the work previously completed and set up the County for continued and long term countywide strategic capital planning.

The program works in conjunction with the Transportation, Facilities and Information Technology Divisions to provide a long term capital asset strategic plan that addresses the infrastructure needs across the County's diverse portfolio. The capital asset plan will identify the infrastructure needs and address the County's capacity to meet the needs based upon the organization's debt, financial and operating capacity.

The Chief Operating Officer (COO), in conjunction with key stakeholders, oversees the planning process, develops the annual capital budget, tracks asset performance and recommends long range capital investment strategies that align with County goals. Critical stakeholders in the planning process include the County Chair, Board of County Commissioners, Chief Financial Officer, Budget Director, Director of the Department of Community Services and Director of the Department of County Assets.

The program works in coordination with the Chief Financial Officer and the Budget Director to ensure the strategic plan aligns with the investment needs, general fund forecast, debt obligations and County values and priorities. This program is located in the Department of County Management and reports directly to the Chief Operating Officer.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Update the long range strategic capital management plan	N/A	N/A	N/A	1
Outcome	Percent of future infrastructure needs accurately identified	N/A	N/A	N/A	100%
Output	Annual report on capital planning program presented to the Board of County Commissioners	1	1	1	1

Performance Measures Descriptions

The Capital Planning Program will update the capital management plan, identify the future infrastructure needs of the County and provide a report to the Board of County Commissioners in FY 2023

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$0	\$150,000	\$0
Total GF/non-GF	\$0	\$0	\$150,000	\$0
Program Total:	\$0		\$150,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by one-time-only General Funds - \$150,000

Significant Program Changes

Last Year this program was:

Department: County Management

Program Contact: Alison Sachet

Program Offer Type: Support

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Evaluation and Research Unit (ERU) does research about workforce equity, employees' experiences, and evaluates programs both countywide and within the Department of County Management. The goal of this work is to ensure that County employees have the resources, support, and environment that they need to thrive as they do the important work to serve the community.

Program Summary

In FY 2022, the Evaluation and Research Unit performed projects to measure: whether employees are paid equitably; trends in hiring, promotions, and separations by different demographics (e.g., race and ethnicity, gender); and employees' experiences of work climate, belonging, job satisfaction, relationships with supervisors and coworkers, communication, the County's equity efforts, and how employees' identities impact their experiences at work. The ERU consistently consults across the County, ensuring that surveys, data collection, and other small research projects are performed with integrity and lead to actionable findings. The ERU also helps to organize a community of practice, which supports a community of researchers and a culture of collaboration and learning across the County's research and evaluation professionals.

The ERU plans to continue this work in FY 2023 and will build on it by working towards greater stakeholder engagement in their work in ways that model people-centered research and design and methods that embody principles of equity, safety, trust and belonging. For example, the ERU plans to convene an Advisory Group, which will be composed of members of Employee Resource Groups and Department Equity Committees, to guide and advise projects to ensure that employees' voices are centered in the work.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of consults performed and reports, presentations, and/or dashboards issued	424	150	175	150
Outcome	Response rate to the Countywide Employee Survey	58%	58%	55%	55%
Output	Number of stakeholder engagement activities	12	27	25	25
Outcome	Percent of county employees stating that they feel like they belong at the county	79%	80%	68%	68%

Performance Measures Descriptions

Measure 1 included 331 pay equity consults in FY 2021. Pay equity consults have since transitioned to Classification and Compensation, so we do not anticipate as many in FY 2022 or FY 2023. Measures 2 and 4 are from the Countywide Employee Survey, which is done every two years. Stakeholder engagement activities are to ensure broad input from diverse stakeholders, including listening sessions and meetings with advisory groups.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$518,286	\$0	\$548,858	\$0
Materials & Supplies	\$21,022	\$0	\$28,512	\$0
Internal Services	\$887	\$0	\$823	\$0
Total GF/non-GF	\$540,195	\$0	\$578,193	\$0
Program Total:	\$540,195		\$578,193	
Program FTE	3.00	0.00	3.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Significant Program Changes

Last Year this program was: FY 2022: 72014 Evaluation and Research Unit

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Support **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Department of County Management (DCM) Business Services Program provides business services to the Department through exercising sound, accurate and transparent financial management. The Program coordinates development of the Department Budget, enfolding equity and inclusion practices in the budget development process, performs financial functions of accounts receivable, accounts payable, grant accounting, procurement and contracting and provides administrative and general accounting support to the Department.

Program Summary

The Department of County Management (DCM) Business Services Program is responsible for coordination and development of a balanced budget that meets Oregon Budget Law, County policies, and the accounting practices established by the County's Chief Financial Officer. Business Services ensures that the Department's budget adequately supports operations and aligns with the organizational values and programs authorized by the Board of County Commissioners.

Business Services is responsible for developing the annual DCM budget through collaboration and engagement with DCM leadership and department programs, following guidance from the Budget Office, enfolding equity and inclusion practices in the budget development process; is responsible for monitoring, analysis, tracking, and financial reporting, position control, adjustments, amendments and modifications; and monitoring various revenue streams and funds. Business Services monitors departmental spending to ensure it is within approved budget limits.

Business Services is responsible for grant accounting, accounts receivable, accounts payable, travel and training coordination, employee reimbursements, procurement card management, general accounting and administrative support, procurement of goods and services in support of DCM operations, and for County-wide contracts and Intergovernmental Agreements. The contracts team provides consultation, procurement and contract development, negotiation, risk assessment and management, supplier management and ongoing contract administration. The program ensures compliance with applicable financial policies, accounting standards and practices, and contract & procurement rules and laws; Collaborates with stakeholders to review Administrative Procedures, policies and the implementation of best practices; and Participates in countywide teams including Finance Managers Forum, Fin Champs, Purchasing Advisory Council, Purchasing Leaders Group, ERP Governance Group, Strategic Sourcing Council and DCM's Workforce Equity Strategic Plan Committees.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	# of Accounts Receivable Transactions processed	896	800	1020	1000
Outcome	% of travel and training events reconciled within 30 days of travel return date	100%	100%	100%	100%
Outcome	Contract Cycle Time - number of days from draft to executed contract	31+ days	30 days	31+ days	30 days
Outcome	% of Accounts Payable invoices paid in 30 days or less	95%	98%	95%	98%

Performance Measures Descriptions

Outcome measures demonstrate adequate controls and processes are in place to ensure compliance with county policies and practices. No out of town travel for FY2021 due to COVID-19 travel restrictions; training shifted to virtual events resulting in 100% reconciliation rate. Accounts Receivable transactions fluctuates annually; Contract cycle time reflects the number of days from initiating in MMP to execution of the contract, with a goal of 30 days. 119 contracts completed in FY2021: anticipate over 100 for FY2022.

Legal / Contractual Obligation

Oregon Budget Law (ORS Chapter 294), Government Accounting Standards Board statements and pronouncements, County Administrative Procedures. Oregon Revised Statutes (ORS) 279A, 279B, and 279C establish requirements affecting the County's procurement and contracting practices. The County Public Contract Review Board (PCRB) Rules and Administrative Procedures CON-1 and PUR-1 define procurement and contracting processes within the constraints of ORS requirements. DCM Contracts utilizing cooperative agreements must adhere to state and federal laws governing the use of the cooperative agreements as described therein.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,203,842	\$0	\$1,265,308	\$0
Contractual Services	\$1,318	\$0	\$0	\$0
Materials & Supplies	\$23,577	\$0	\$26,087	\$0
Internal Services	\$126,940	\$0	\$139,255	\$0
Total GF/non-GF	\$1,355,677	\$0	\$1,430,650	\$0
Program Total:	\$1,355,677		\$1,430,650	
Program FTE	8.50	0.00	8.50	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues

Significant Program Changes

Last Year this program was: FY 2022: 72015 DCM Business Services

Business Services Program continues to adapt to remote work due to the pandemic, and has successfully transitioned much of the business processes to virtual methods.

Department: County Management

Program Contact: Travis Graves

Program Offer Type: Administration

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

Central Human Resources (HR) Administration is the administrative program that oversees and supports the work units that make up the Central HR Division. The Chief Human Resources Officer strategically leads and partners with department HR units to guide consistent, equitable, efficient, and cost effective HR practices across the organization. The Central HR Division consists of several work units which are each stand-alone program offers.

Program Summary

Central HR Administration is made up of the office of the Chief Human Resources Officer (CHRO), and the administrative support team that supports that position as well as the Central Human Resources Division. The CHRO directly oversees Employee Benefits and Wellness, Classification and Compensation, Labor Relations, Organizational Learning, Talent Acquisition, Unemployment Insurance Program, Workday Human Capital Management as well as county wide communications on HR related topics, COVID-19, Workforce Equity, etc. Additionally, indirect leadership relationship between the CHRO, and the HR Managers/Directors at each department as well as with Department Directors.

The CHRO sets direction, determines policy, develops business processes, and builds relationships to develop and sustain a diverse, inclusive, equitable and talented workforce necessary to successfully provide a variety of services to our community. The CHRO focuses on communicating with and seeking feedback from internal stakeholders (elected and department leadership, employee resource groups, HR partners, labor unions, etc.), and engaging in collaborative problem solving to guide and deliver on the division's strategic plan. The CHRO is the primary liaison to elected and departmental leaders to ensure HR processes align with countywide business goals and values as well as the Workforce Equity Strategic Plan, and oversees the evaluation of HR contributions to organizational effectiveness. The CHRO oversees countywide program integration and performance measurement; leads HR technology development and process automation; provides budget and financial management; and ensures compliance with federal, state, local laws, rules, regulations and labor agreements.

The administrative support team in Central HR Administration: coordinates the Countywide Employee Recognition programs including Years of Service, and Employee Awards; coordinates response to unemployment claims; processes countywide transfer requests and lists; distributes regular announcements regarding job openings; as well as general office administration and management for the CHRO and the division.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of countywide job applications received	16,808	15,000	18,000	20,000
Outcome	Percentage of employees indicating that they are fully engaged in their jobs	83%	85%	83%	85%
Output	Number of employees nominated for annual employee awards	1095	400	400	400
Output	Number of employees celebrated for reaching milestone years-of-service anniversaries	774	700	709	650

Performance Measures Descriptions

Output 1: The number of job applicants reflects the desirability of Multnomah County as an employer, as impacted by policy direction. Outcome: Percent of respondents that "agree" or "strongly agree" to the question "I am fully engaged in my job" on the bi-annual Countywide Employee Survey. Output 3 & 4: Countywide employee recognition programs reflect efforts toward employee retention and job satisfaction.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$464,556	\$0	\$492,569	\$0
Contractual Services	\$55,806	\$0	\$55,806	\$0
Materials & Supplies	\$47,130	\$0	\$47,130	\$0
Internal Services	\$546,540	\$0	\$566,340	\$0
Total GF/non-GF	\$1,114,032	\$0	\$1,161,845	\$0
Program Total:	\$1,114,032		\$1,161,845	
Program FTE	2.63	0.00	2.63	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72016 Central HR Administration

The staff members reflected in this program offer have moved to hybrid work schedules, splitting days in the office and teleworking.

Department: County Management

Program Contact: Chris Lenn

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

Central Human Resources (CHR) Services is responsible for providing key programs and services that support employees throughout their lifecycle and leading CHR efforts to advance best practices in workforce equity, recruitment, onboarding, learning and professional development, leadership development, conflict resolution, performance planning and review, and career pathways that furthers Multnomah County's ability to attract, train, and retain a diverse, high performing, and supported workforce. Through collaboration and partnership, CHR Services enables Multnomah County to fulfill and advance countywide recommendations from strategic plans and employee feedback trends.

Program Summary

Organizational Learning provides a wide range of services including culturally responsive training, leadership development, facilitation services, conflict resolution learning and mediation support, and professional development opportunities for the general workforce. Organizational Learning maintains the County's Core Competencies, the skill sets that help County employees promote our values of safety, trust, and belonging. The Leadership Development Program delivers programs that increase manager accountability, strengthen knowledge of county processes and policies, and build the interpersonal skills that promote a culture of safety, trust, and belonging in the workplace.

Talent Acquisition focuses on recruitment strategies, screening and selection best practices, new employee experience, and workforce pathways that promote the County's mission to build a diverse and talented workforce. The centralized function serves as a subject matter-expert, provides guidance to departmental recruitment resources, and facilitates the countywide Employment Committee. The College to County Mentorship Program, a workforce pathways initiative focuses on the development of college students from underrepresented communities by offering paid internship opportunities in County projects across departments and matches participants with a trained mentor.

HR project and change management focuses on countywide HR projects that respond to the highest priority needs identified by internal priorities (ex: Workforce Equity Strategic Plan, HR Audit) and external industry best practices related to the field of Human Resources. Dedicated internal communications resources provide employees timely and accessible information on county management policies and resources relevant to employee experiences and expectations.

Centralized performance planning, coordination of departmental orientation and onboarding efforts, and career development training also provide services to employees throughout their lifecycle and help to advance overall workforce growth and success.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Participation in a learning courses, orientations, community of practice presentations, or service requests	2,297	2,200	2,225	2,500
Outcome	Percent of Performance Reviews completed in the Year End phase	83	95	95	90
Output	Employees trained on effective interview panel and selection skills	105	200	160	200
Output	Number of College to County Mentees placements	54	50	60	50

Performance Measures Descriptions

Output/Outcome measures align with key performance goals of the Workforce Equity Strategic Plan. Participant learning outputs are intended to capture knowledge transfer and support of professional development which both align with the organizational commitment to becoming a learning organization. Continued impacts of COVID, plan for relaunching training was delayed and therefore enrollment was less than anticipated in some areas. Performance Measure on learning participation was adjusted from previous year to include all CHR Services' team's learning offerings.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$2,546,376	\$0	\$2,668,789	\$0
Contractual Services	\$132,000	\$0	\$104,203	\$0
Materials & Supplies	\$62,600	\$0	\$68,360	\$0
Internal Services	\$162,166	\$0	\$171,738	\$0
Total GF/non-GF	\$2,903,142	\$0	\$3,013,090	\$0
Program Total:	\$2,903,142		\$3,013,090	
Program FTE	14.00	0.00	14.00	0.00

Program Revenues				
Service Charges	\$25,000	\$0	\$25,000	\$0
Total Revenue	\$25,000	\$0	\$25,000	\$0

Explanation of Revenues

This program is supported by General Fund revenues. For training events that require administration of certain tools or tests or provide professional certifications outside the usual scope of countywide training, a portion of the cost of attendance will be charged back to the cost center of the employee attendee, for an aggregate total of \$25,000.

Significant Program Changes

Last Year this program was: FY 2022: 72017A Central HR Services

Department: County Management

Program Contact: Chris Lenn

Program Offer Type: Innovative/New Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

This Program Offer would develop and pilot a Recruiter Training & Capacity Building Program that lives under the Talent Acquisition portfolio in Central Human Resources. This program would provide training and hands-on experience as a Recruiter. As a part of the training, these roles would be deployed to support outstanding recruitment needs in departments to supplement department HR and help them to fill vacancies.

Program Summary

This Program Offer enhances the services provided by Talent Acquisition in Central Human Resources. This offer provides one time only funds for 4 LDA HR Analyst 2 positions. The goal of this program is to minimize impacts to County operations due to unfilled positions by developing and deploying a bench of recruitment talent with equity informed training to supplement recruitment efforts in departments. This program will provide training to ensure new and existing recruiters are focused on applying best practices that will support our WESP initiatives, including how to develop diverse applicant pools and how implicit and structural biases show up throughout the recruitment process as well as their mitigation strategies. Participants will be able to gain hands-on experience that operationalizes inclusive recruitment best practices needed to step into a vacant recruiter position in the future or increase a department's recruitment capacity in times of high vacancies.

In addition, to promote job postings, increase applicant pools and engage with passive candidates, this program includes a professional LinkedIn Recruiter License. This would allow the County to highlight and sponsor job postings which would allow County jobs to show up at the top of a search conducted by candidates and allow recruiters to search for and connect with potential candidates based on details listed on their profile.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Total number of recruitments led managed by Talent Acquisition Analysts/Recruiters	N/A	N/A	N/A	80
Outcome	Percent of recruitments led by the Talent Acquisition Analysts that result in a hire	N/A	N/A	N/A	90%
Output	Total number of training hours offered on equity informed recruitment & selection practices	N/A	N/A	N/A	40

Performance Measures Descriptions

Output: These roles will be deployed to departments to supplement their recruitment efforts to fill the backlog of vacant positions. Outcome: A successful recruitment is one that ends in hire (either internal candidate or external candidate). Output: Specific and dedicated training hours for new and existing recruiters on equity informed recruitment and selection practices on topics such as writing job announcements, interview best practices, bias mitigation strategies, outreach, and screening for minimum qualifications.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering Civil Service recruitment processing, Veterans Preference, discrimination, American with Disabilities Act and other hiring related issues. Labor agreements necessitate contract compliance regarding transfer rights, rates of pay, hours of work, and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$605,996	\$0
Materials & Supplies	\$0	\$0	\$16,004	\$0
Total GF/non-GF	\$0	\$0	\$622,000	\$0
Program Total:	\$0		\$622,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Labor Relations provides leadership to ensure effective labor-management relationships, appropriate work conditions and legal compliance that balance the rights of employees with the business needs of the County. This program manages 12 labor contracts, representing 86% of the County workforce, and the Personnel Rule (work rules) that apply to all 100%.

Program Summary

Collective Bargaining Agreement (CBA) negotiation and interpretation present the front line of interaction with our employees' Labor Unions. Historically staggered dates for contract renewals have allowed the best opportunity to strategically plan and time proposals for contract changes. Managing negotiations during the COVID-19 pandemic, however, has resulted in many CBA negotiations being settled with one-year extensions, resulting in the accumulation of negotiation obligations FY2022 and beyond.

Forums, such as Employee Relations Committees and the Employee Benefits Advisory Team, along with tools such as negotiated Memoranda, allow the candid communication, clear and accessible decision-making, and collaborative problem solving needed to achieve consistent labor/management practices throughout the County. Additionally, Labor Relations has integrated consideration of Diversity, Equity, and inclusion dynamics into its work negotiating and interpreting/applying labor contracts, and various CBA impacts on employees in historically disadvantaged groups.

Labor Relations:

- Leads collective bargaining activities, including contract negotiations, interim negotiations, labor contract administration and interpretation.
- Guides development of employee relations programs to create and promote a positive organizational culture, and advocate for fair, respectful treatment of employees.
- Provides internal expertise for dispute resolution, grievance handling, and cooperative problem solving.
- Maintains and develops personnel rules; ensures consistent application of CBAs, personnel rules, discipline policies, and; administers the County's drug and alcohol testing process.
- Coordinates countywide layoff activities and the merit council appeals process; and
- Ensures compliance with federal, state, local laws, rules, regulations and labor agreements, and communicates, trains and coaches supervisors, managers and department human resources units on these requirements.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of labor disputes	141	116	162	140
Outcome	Percentage of labor disputes settled collaboratively.	90%	98%	93%	94%

Performance Measures Descriptions

Output and Outcome: Resolving formal and informal labor disputes collaboratively means efficiently addressing concerns without the necessity of arbitration, which can be costly and result in a binding decision not in the County's best interest. Additionally, the County now seeks to include Diversity & Equity considerations, applying equity consideration lenses to determining the County's interpretations in labor disputes, so as to work from more Diversity, Equity, and Inclusion-informed positions.

Legal / Contractual Obligation

Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits, and other matters pertaining to employment. Federal, State, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Reemployment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$933,104	\$55,943	\$968,946	\$57,752
Contractual Services	\$9,750	\$0	\$9,750	\$0
Materials & Supplies	\$13,100	\$0	\$15,308	\$120
Internal Services	\$32,914	\$1,390	\$29,372	\$1,325
Total GF/non-GF	\$988,868	\$57,333	\$1,023,376	\$59,197
Program Total:	\$1,046,201		\$1,082,573	
Program FTE	4.60	0.25	4.60	0.25

Program Revenues				
Other / Miscellaneous	\$0	\$57,333	\$0	\$59,197
Total Revenue	\$0	\$57,333	\$0	\$59,197

Explanation of Revenues

This program is supported primarily by the General Fund with 0.25 FTE Labor Relations Manager supported by the Risk Fund.

Significant Program Changes

Last Year this program was: FY 2022: 72018 Central HR Labor Relations

Due to the COVID-19 Pandemic, some staff in this program were initially released from an office environment into a telework environment; others moved to be near the Emergency Operations Center, but have since been released to telework. Operational changes have included establishing virtual bi-weekly meetings with the county's largest employee union, AFSCME Council 75, regarding various Labor Issues associated with the COVID-19 pandemic. Communication is done primarily via email and chat, including virtual meetings with staff and bargaining units. These changes also included having held virtual bargaining sessions with those bargaining units who had open contracts this fiscal year.

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Unemployment Insurance Program provides unemployment benefits to eligible workers who are unemployed due to layoff or other discharge for reasons other than misconduct. Unemployment insurance replaces part of the income that employees lose when they become unemployed.

Program Summary

Unemployment benefits are provided through the State or Oregon Employment Department. The County funds these benefits, as a self-insured employer, with direct payments to the state. Former employees, or employees who have had their hours reduced, submit claims to the State, who determines eligibility and benefit amounts. The State recoups funding for the claims directly from the County quarterly. Claimants file an appeal with the State when they want to contest an eligibility decision, for a hearing with an administrative law judge.

The Unemployment Insurance Program provides the funding to ensure eligible workers secure financial assistance when they are no longer employed by the County, or their hours are reduced. The program responds to the State's Employment Department in a timely manner, provides accurate and timely monitoring and reporting, and participates in all appeal hearings to decrease costs and liability due to ineligible claims. The County doesn't contest eligible claims, but benefits claim decisions can favor the applicant if responses are late, data is inaccurate or an employer fails to respond to a requested clarification.

The impact of COVID-19 has been an increase in the number of claims filed. Fraudulent claims, which were previously non-existent, have reached 212 since the onset of work-from-home directives in March 2020. This has been due to a nationwide issue with "bad actors" using unemployment claims as a method of identity theft. Ultimately, there should be no financial impact as these claims should be closed, but there has been an increase in county-to-employee contact as we notify each employee or former employee they have possibly been a victim of ID Theft.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of employee claims for unemployment.	597	475	424	450
Outcome	Percentage of unemployment claim appeals found in the county's favor.	67%	50%	50%	50%
Output	Number of unemployment appeals.	9	8	8	8

Performance Measures Descriptions

Outputs and Outcomes: The number of claims for FY 2022 is higher than budgeted due to the reasons listed in summary. Appeals are filed when the claimant disagrees with the benefit eligibility decision by the State; claims in the County's favor means a lower expense and lower risk to the County.

Legal / Contractual Obligation

Unemployment Insurance benefits are mandated by federal and state laws. Oregon Employment Law, statues 657.005 and 657.010, Federal Unemployment Act Social Security Act.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$39,415	\$0	\$40,678
Contractual Services	\$0	\$150	\$0	\$150
Materials & Supplies	\$0	\$970,921	\$0	\$970,993
Total GF/non-GF	\$0	\$1,010,486	\$0	\$1,011,821
Program Total:	\$1,010,486		\$1,011,821	
Program FTE	0.00	0.15	0.00	0.15

Program Revenues				
Other / Miscellaneous	\$0	\$1,010,486	\$0	\$1,011,821
Total Revenue	\$0	\$1,010,486	\$0	\$1,011,821

Explanation of Revenues

This program is supported by the Risk Fund. Unemployment claims are funded by assessing a rate based on 0.25% of monthly payroll for each department. Revenue for FY23 is \$1,011,821.

Significant Program Changes

Last Year this program was: FY 2022: 72019 Central HR Unemployment

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The County's Benefit programs provide comprehensive health and financial security options to help over 12,000 employees, retirees and their families to ensure their needs are covered. Health programs focus on prevention and managing chronic conditions. Work is ongoing to promote greater health equity. Our health vendors have been asked to increase access to more diverse providers within their provider panels and some improvements have been made.

The Wellness Program promotes and supports holistic workforce well-being across seven dimensions of wellness. It serves employees and families through programming, services, and practices, aligned with Central HR's priorities, that center equity and investment in employee well-being and experience, and workplace culture.

Program Summary

By internally administering the County's health and welfare programs, the department can best support our populations' unique business, labor and financial requirements. The team monitors transactions and contractual arrangements carefully to provide sound fiscal management in coordination with DCM Business Services and Financial partners.

The Benefits team administers a complex array of plans while ensuring compliance with labor contracts, federal, state and local laws and mandates. Coverages include a variety of comprehensive health coverage options, a VEBA health reimbursement account, basic and supplemental life insurance, flexible spending accounts for health, dependent/elder care and transit, leave management, and short/long term disability benefits. These programs help provide employees with peace of mind by supplying the resources to protect their financial security and physical and mental health and well-being.

Participants include over 12,000 employees, spouses or domestic partners, dependent children and retirees. The team also consults and coordinates with County employees and departments to ensure timely enrollment in benefit plans, accurate payroll deductions, and user-friendly benefit communication/educational materials. Member advocacy is available through Benefits to assist plan participants and facilitate problem resolution. Prospective retirees are counseled to understand their County-provided options during their pre-retirement planning process.

The program works closely with County labor unions and management to structure benefit components that provide desirable, affordable and sustainable benefit options within budgetary constraints.

Wellness programs can help reduce employee health plan costs and absenteeism, while enhancing employee recruitment, retention, morale, and productivity. The Employee Wellness Program adapts to serve the most relevant and emerging wellness needs of our employees as identified by population health data, employee feedback, and in response to Countywide equity efforts. Programming and policies focus on a holistic approach to well-being across multiple dimensions of wellness including physical, emotional, intellectual, financial, social, environmental, and a sense of purpose.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Medical plan annual member count.	12,100	12,400	12,400	12,500
Outcome	Participation in county wellness programs.	9,202	11,675	7,008	7,000
Efficiency	County's annual benefits cost change per employee.	4.2%	5.4%	5.75%	5%

Performance Measures Descriptions

Output: Total number of members enrolled in health plan coverage during the plan year. This includes employees, retirees, COBRA participants and dependents from all. Outcome: This totals the participation across all Wellness offerings in which some report unique participants and others report number of engagements by participants (not unique). Efficiency: Actual and projected changes in annual county benefit costs per employee.

Legal / Contractual Obligation

County labor contracts have benefit mandates for active and retired members. Benefits are governed by Federal/State/local laws and agencies, including the IRS, Dept of Labor (DOL), Dept of Health and Human Services (HHS), COBRA, Working Families Tax Relief Act, Older Workers Benefit Protection Act, Genetic Information Nondiscrimination Act (GINA), HIPAA, PPACA, CHIP, civil rights and EEO laws. Labor contracts require a transit pass be provided, so the county follows OAR Chapter 340, Div 242 that requires employers provide commute options to achieve and maintain a reduced auto trip rate.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$3,156,213	\$0	\$3,321,205
Contractual Services	\$0	\$1,822,330	\$0	\$1,808,770
Materials & Supplies	\$0	\$125,625,501	\$0	\$146,506,902
Internal Services	\$0	\$373,490	\$0	\$372,527
Total GF/non-GF	\$0	\$130,977,534	\$0	\$152,009,404
Program Total:	\$130,977,534		\$152,009,404	
Program FTE	0.00	13.37	0.00	13.37

Program Revenues				
Other / Miscellaneous	\$0	\$129,777,534	\$0	\$143,386,675
Service Charges	\$0	\$0	\$0	\$25,000
Total Revenue	\$0	\$129,777,534	\$0	\$143,411,675

Explanation of Revenues

Sources of revenue are: departmental contributions for health plan coverage (\$114,590,982 Actives/\$8,405,576 Retirees), Short and Long Term Disability and Life Insurance (\$3,175,000); benefit administration charge, (\$4,548,046), employee payroll deductions (both pre- and post- tax) for benefit plan participation (\$6,235,000), premium payments from retirees and COBRA participants (\$4,900,000), and operational refunds, forfeitures, rebates, performance guarantee penalties from vendors, space rentals (\$1,120,000).

Significant Program Changes

Last Year this program was: FY 2022: 72020 Central HR Employee Benefits & Wellness

Benefit operations have converted to a primarily virtual format, with limited staff presence in the office each week for mail and check processing. Wellness numbers decreased because several programs that measure participation have been paused due to COVID-19, including fitness center utilization and fitness class utilization, and employee discount access. Other programming continues in a virtual format.

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

HR Workday Support provides strategic, technical, and operational leadership for the County's Human Capital Management System. Workday was implemented in January 2019 as part of the county's enterprise resource planning system (ERP). HR has implemented a three tier support model utilizing employee self-service, HR operational teams and HR Workday support staff. The HR Workday Support team is responsible for developing, maintaining, troubleshooting, and enhancing Workday Human Capital Management (HCM) functionality in collaboration with County functional subject matter experts, ensuring an effective, efficient and innovative ERP system.

Program Summary

The Workday Support Team manages human resources operational and strategic functions in Workday including project management, business analysis, configuration, reporting and daily maintenance across the multiple HR disciplines. For HCM and payroll the team supports Workday functions including maintenance of supervisory organization, maintenance of jobs architecture, payroll, compensation, talent, recruiting, core HR, time, absence, benefits and learning. The Workday Management Team will perform the following functions:

1. System configuration related to new functionality or changes to existing system.
2. Manage system business processes, determine the methodologies for implementing and maintaining HCM and payroll systems, business processes and procedures to achieve a consistent and predictable employee and manager experience across the county.
3. Conduct audit, analyze data, and perform testing to protect data integrity and internal controls.
4. Meet regularly with HR stakeholder groups to share and prioritize new functionality in upcoming Workday releases.
5. Provide ongoing learning support to all county HCM users to enhance skill development and adoption for system end users, in conjunction with Central HR Organizational Learning team.
6. Write reports and maintain existing reports to meet HR business and operational needs.
7. Manage business relationship with Workday.
8. Work collaboratively with Information Technology and Workday Support-Finance team on technical issues and solutions.
9. Provide analysis support for human resource data associated with the Workforce Equity Strategic Plan.
10. Develop and present reports that show progress towards workforce goals.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of resolved department HR and user issues as identified in ServiceNow.	2355	4800	2760	2760
Outcome	Percentage of Workday new release functionality implemented in support of improved HR operations.	51%	45%	75%	95%
Efficiency	Business processes initiated through employee and manager self service.	149,000	60,000	75,000	75,000
Output	Number of learning support sessions provided to Human Resources support teams.	10	5	10	10

Performance Measures Descriptions

Output: Measures resolution of ERP HR & Payroll ServiceNow and Basecamp tickets. Outcome: Increased implementation of Workday release functionality. Efficiency :Effectiveness of change management and organizational adaptation to the new system. Output: Develop ongoing training plan for HR Operational users and establish Employee and Manager Workday training in partnership with Organizational Learning.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,672,890	\$0	\$1,751,401	\$0
Contractual Services	\$14,387	\$0	\$14,387	\$0
Materials & Supplies	\$56,664	\$0	\$60,984	\$0
Internal Services	\$101,573	\$0	\$111,792	\$0
Total GF/non-GF	\$1,845,514	\$0	\$1,938,564	\$0
Program Total:	\$1,845,514		\$1,938,564	
Program FTE	9.00	0.00	9.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Supported by General Fund Revenues

Significant Program Changes

Last Year this program was: FY 2022: 72022 Workday Support - Central Human Resources

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The HR Workday Support Team manages human resources operational and strategic functions in Workday including project management, business analysis, configuration, reporting and daily maintenance across the multiple HR disciplines. This program offer requests funding for one new position. This position will provide additional resources, allowing for a restructuring of work across the HR Workday team, resulting in a more balanced workload for team members and improved team morale. Additionally, the position will allow the HR Workday team to maintain and improve on current service levels, as well as adding much needed capacity to focus on key projects to improve and enhance current system functionality.

Program Summary

This program would fund one additional FTE to support HR Workday administration. The HR Workday Support team provides essential Countywide support for the HCM module of Workday. The team continues to provide higher levels of support for day to day operations than initially expected. To meet current support needs and deliver critical functionality, the HR Workday team consistently works a substantial amount of hours, often working extremely late in the day and on days off including weekends, holidays and vacations.

The initial support model developed in advance of go live was expected to dedicate approximately 75% of work to system enhancements and improvements and 25% to user support. In reality, the team dedicates 75% to user support and has not had the capacity for system enhancements and improvements. This has resulted in a significant backlog of key configuration that would improve overall system performance, operational efficiencies, and improved end-user experience. The constant improvements and functionality released from Workday has highlighted the need for an additional FTE. The additional FTE would be utilized to staff the day-to-day support of HCM to ensure we maintain current service levels, while also allowing for key staff to prioritize and implement important projects.

Potential key projects include implementation of Multiple Jobs functionality, redesign of the Change Job process, implementation of organizational dashboards, redesign of position management, etc. These projects have been on the HR Workday team roadmap for over 2 years but have not been implemented due to resource constraints. These projects are expected to significantly improve user experiences, process efficiencies, and organization/employee data. Each implementation requires requirements gathering from many stakeholders, design, configuration, comprehensive end to end testing, and implementation including change management and user training. With workload and staffing limitations, it has not been feasible to dedicate adequate resources for implementation and testing. The current backlog of these projects is approximately 2 years.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Reduction of backlogged ServiceNow support tickets and improved resolution time	N/A	N/A	N/A	500
Outcome	Increased implementation of new functionality, target goal of implementing 85% of applicable functionality	N/A	N/A	N/A	85%
Outcome	Implementation of backlogged projects; reducing backlog by 25%-30%	N/A	N/A	N/A	25-30%

Performance Measures Descriptions

Output: measures the reduction of backlogged support tickets currently tracked in ServiceNow. Outcome: measures the reduction of items currently identified on the HR Workday team project backlog.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$199,999	\$0
Materials & Supplies	\$0	\$0	\$16,718	\$0
Total GF/non-GF	\$0	\$0	\$216,717	\$0
Program Total:	\$0		\$216,717	
Program FTE	0.00	0.00	1.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Program supported by ongoing General Fund revenue.

Significant Program Changes

Last Year this program was: FY 2022: 72022 Workday Support - Central Human Resources

This Program Offer is requesting additional ongoing General Funds to fund a new position. This position will fund a Workday Administrator to support current end-users and administer and implement Workday HCM projects.

Department: County Management **Program Contact:** Jeffrey Brown
Program Offer Type: Administration **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Administration plans, directs, and coordinates operations and activities of the County's Division of Assessment, Recording and Taxation (DART); performs state mandated functions of the Assessor, Tax Collector, and certain County Clerk functions monitors activities for statutory compliance; establishes effective implementation of policies, strategic direction, program evaluation, and process/technology improvements; provides financial and tactical resource planning and employee development and performance management.

Program Summary

The Division of Assessment, Recording, and Taxation (DART) performs the duties of the County Assessor including property valuation and assessment, property tax rate/levy calculation, certifying the property tax roll for collection, ownership and records management, and mapping. It is responsible for maintaining Real Market Value for 310,000 real and personal property accounts, as well as capturing and calculating taxable value events as outlined in ORS 308.146, which increases total Assessed Value of taxing districts. DART's duties as the Tax Collector entails billing, collections, and distribution of more than 2 billion dollars in property taxes. Our County Clerk responsibilities consist of document recording, providing marriage licenses, domestic partnership registrations, and administration of the Board of Property Tax Appeals.

The Administration program plans, directs and coordinates the operations and activities of DART. This includes strategic direction and tactical planning; policy development and implementation; financial planning and budget development; employee development, training, succession planning and performance management; continuity of operations planning; technology and information systems; quality control, program measurement, evaluation, and process improvements; administrative support, communications, including news media, as well as oversight of over 500,000 customer service interactions annually.

The program supports and provides leadership that ensures all property is valued accurately and taxed fairly as required by the Oregon State Constitution, Oregon Revised Statutes, and the Oregon Department of Revenue Administrative Rules. It also monitors division activities and processes for equitable and inclusive practices, statutory compliance, as well as submission of the required compliance reports to the Oregon Department of Revenue. This program also ensures the timely collection of property taxes, maintains accurate and accessible property ownership records, and property descriptions that are used in the production of county property tax maps. The program continues to provide quality customer service to the public and internal clients while making certain every function is reviewed to ensure that no service the division provides is impacting any segment of those we serve in an unfair, inequitable or non-inclusive manner.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Total Number of Property Tax Accounts Administered	309,900	310,000	311,000	311,000
Outcome	Percent Acceptable Compliance Reports Required by Oregon Department of Revenue	100	100	100	100
Efficiency	Administrative Costs as a Percent of Actual Expenditures	6	6	6	6
Efficiency	Cost of Collection per Account (in Dollars)	\$4	\$4	\$4	\$4

Performance Measures Descriptions

The percent of required compliance reports received and accepted by the Dept of Revenue (CAFFA Grant Document, Appraisal Plan, Sales Ratio Study) implies adequacy of DART operations and uniform taxation. The goal is to maintain administrative costs at 6-7% of total DART operating program expenditures. The cost of collection per account will fluctuate depending on costs of collection activities and the number of accounts.

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305-312 and 321. Additionally, ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept of Revenue (DOR). Through the "County Assessment Function Funding Assistance" (CAFFA) Grant process described in ORS 294.175, the DOR determines guidelines for acceptable levels of assessment and taxation staffing. Per their metric, DART staffing is at the lower end of adequate to perform statutory functions. Reductions to program may jeopardize grant revenue.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$679,297	\$0	\$550,817	\$0
Contractual Services	\$9,100	\$0	\$6,700	\$0
Materials & Supplies	\$49,262	\$0	\$49,119	\$0
Internal Services	\$128,551	\$0	\$148,311	\$0
Total GF/non-GF	\$866,210	\$0	\$754,947	\$0
Program Total:	\$866,210		\$754,947	
Program FTE	3.40	0.00	2.40	0.00

Program Revenues				
Fees, Permits & Charges	\$77,500	\$0	\$80,000	\$0
Intergovernmental	\$81,413	\$0	\$83,448	\$0
Total Revenue	\$158,913	\$0	\$163,448	\$0

Explanation of Revenues

DOR's County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of program expenditures. Grant amounts can vary depending upon the CAFFA pool and the allocated percentage to each participating county. Multnomah County's share of CAFFA is estimated at \$3,079,265, with \$83,448 allocated to DART Administration. General Fund Revenue of \$80,000 is from a portion of the document recording fee (5% of the \$10 per document fee) and is for maintenance of county property tax systems. Revenue from recording fees varies annually due to economic factors affecting the number of documents recorded. (Note: The balance of the \$10 recording fee is allocated to the County Clerk (5%) and the County Assessment & Taxation Fund (90%) for distribution to the DOR for deposit into the statewide CAFFA Account.) Remaining program support is from General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72023 Div of Assessment, Recording & Taxation Administration

1.00 FTE HR Analyst Sr moved from DART Administration Program 72023 to the DCM Director's Office/COO Program 72000A

Department: County Management

Program Contact: Tim Mercer

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
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. The Customer Service professionals assist the community by providing virtual and in person assistance with questions regarding and the acceptance of property tax payments, marriage licenses and domestic partnerships, passport services including passport photos, employee IDs, and administer the Board of Property Tax Appeals. This excellent service is provided through the organization's soft phone system, at the public counter, through mail, by email, and via online chat.

Program Summary

The Customer Service unit is responsible for assisting taxpayers in person, over the phone, and through chat and email; the issuance and record keeping of marriage licenses and domestic partnerships which are governed by state law; managing the passport acceptance program that is administered by federal laws and regulations; accepting property tax payments that are guided by state statutes; and administering the Board of Property Tax Appeals program that is guided by state statutes. The Employee Photo unit is responsible for the issuance of county employee photo IDs and processing passport application photos.

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. During FY21, the Customer Service program responded to approximately 110,000 inquiries, with 13,456 being walk-in tax payments accepted during our limited 4 week opening in October and November of 2020 when the Multnomah building was officially closed to the public. In addition to providing direct customer service, the team reaches out with marketing campaigns regarding tax due dates and information on how to pay. The team also provides the use of drop boxes for property tax payments throughout the county that are operational around the November property tax payment due date annually in order for the community to not have to travel to the Multnomah building in order to pay in person. The department also continues to further improve online payment options.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of counter transactions	13,456	57,500	32,070	35,000
Outcome	Average number of transactions per cashier	1,455	6,230	3,207	3,500
Output	Number of phone calls, emails, and chats received and answered	94,529	79,000	101,352	100,000
Outcome	Average number of phone calls, emails, and chats per operator	9,453	8,500	10,135	10,000

Performance Measures Descriptions

"Number of counter transactions" includes computer-generated statistics from the operating systems used in Customer Service. The system tracks revenue-generating transactions including tax payments, marriage licenses, domestic partnership registrations, passport applications and copies of various records.

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

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,219,277	\$0	\$1,290,928	\$0
Contractual Services	\$2,650	\$0	\$2,250	\$0
Materials & Supplies	\$19,875	\$0	\$20,975	\$0
Internal Services	\$354,684	\$0	\$423,790	\$0
Total GF/non-GF	\$1,596,486	\$0	\$1,737,943	\$0
Program Total:	\$1,596,486		\$1,737,943	
Program FTE	11.45	0.00	11.45	0.00

Program Revenues				
Intergovernmental	\$274,580	\$0	\$281,445	\$0
Total Revenue	\$274,580	\$0	\$281,445	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures. Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265, with \$281,445 allocated to DART Customer Service. Remaining Customer Service Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72024 DART Customer Service

Department: County Management

Program Contact: Tim Mercer

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The County Clerk Functions program consists of recording land related and other legal documents, issuance of Marriage Licenses and Domestic Partnership Registrations, acceptance of Passport Applications, creation and maintenance of permanent records, issuance of certified copies, and administration of the Board of Property Tax Appeals (BoPTA). BoPTA is responsible for hearing petitions from taxpayers who disagree with their property value. The Board makes decisions to reduce property values or waive personal property late filing fees based on evidence provided by the taxpayer.

Program Summary

For FY 2021, 202,561 documents were recorded, 4,555 Marriage Licenses were processed, and 160 Domestic Partnership Registrations were issued. For FY21, 538 BoPTA appeals were processed. Due to COVID and the Multnomah building being closed to the public, passport services were not operational, thus no Passport Applications and passport photos were processed. The Customer Service team adjusted to this situation by making the marriage license process, which is a mandated function, a mail in process. The team also, not only maintained, but increased Customer Service support through phone, emails, mail, and chat in order to accommodate the building being closed. For FY21, the clerk functions of the Board of Property Tax Appeals program were reimagined to an online format, but a need for in-office processing of certain appeals functions still existed, necessitating the need for a small number of the team to work in the Multnomah building.

The Recording staff received over 46,717 recordings via mail and provided customer support via phone and email. This program also makes available records for customer use and provided alternative ways for the public to access records during the period that the building, thus the Digital Research Room, was closed to the public. Electronic recording functionality was installed in 2012 and additional service providers were added in subsequent years, improving efficiency and customer service. Currently, more than 75% of recording transactions are completed electronically.

The office opened to the public for a limited duration in October and November of 2020 to ensure those community members who wanted to pay their property taxes in person were able to. Our services officially opened to the public in July 2021 and initially were by appointment only. At this time, marriage license applications and domestic partnership applications are by walk-in service only, passport applications and photos are taken by appointment only, tax payments continue to remain a walk-in function. The Digital Research Room is operational and available by appointment or walk-in service with a limited capacity. Teleworking continues on a daily basis for a percentage of the team who are responsible for answering incoming calls, chats, and emails.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of marriage licenses issued	4,555	7,500	4,680	4,900
Outcome	% of accurately processed licenses	95%	95%	95%	95%
Output	Number of documents recorded	202,561	160,000	165,000	160,000
Outcome	Average number of business days to return original recorded documents	2	2	2	2

Performance Measures Descriptions

The "% of Accurately Processed Licenses" is a measure to track errors on licenses internally. The "Average Number of Business Days to Return Original Recorded Documents" is a measure of compliance with the statutory requirement that documents be returned within 10 business days.

Legal / Contractual Obligation

The County Clerk functions are governed by Oregon Revised Statutes (ORS) Chapter 205. Multnomah County Ordinance 948 authorizes couples to voluntarily register as domestic partners. Additional statutes pertaining to this program are found in ORS 106, 107, 409, 432 (marriage/state domestic partnerships); ORS 86, 87, 93, 100 (requirements for recording); and ORS 306 and 309 (Board of Property Tax Appeals). Guidelines for the acceptance of Passports are set by the US Department of State. ORS 205.320(2) requires dedication of a portion of recording fees to the restricted County Clerk Fund for records storage and retrieval systems.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,265,127	\$0	\$1,336,238	\$0
Contractual Services	\$233,439	\$0	\$284,658	\$0
Materials & Supplies	\$98,135	\$0	\$105,804	\$0
Internal Services	\$264,819	\$0	\$206,589	\$0
Total GF/non-GF	\$1,861,520	\$0	\$1,933,289	\$0
Program Total:	\$1,861,520		\$1,933,289	
Program FTE	11.45	0.00	12.05	0.00

Program Revenues				
Fees, Permits & Charges	\$5,765,025	\$0	\$5,254,500	\$0
Intergovernmental	\$20,428	\$0	\$20,939	\$0
Other / Miscellaneous	\$230,000	\$0	\$250,000	\$0
Beginning Working Capital	\$141,100	\$0	\$200,400	\$0
Total Revenue	\$6,156,553	\$0	\$5,725,839	\$0

Explanation of Revenues

A \$60 fee is collected for each marriage license, State and County Domestic Partnership (DP) registration: \$25 to the County General Fund, \$25 to State Domestic Violence fund (for licenses and State DP), \$25 to County Community and Family Services for domestic violence victims (for County DP), and \$10 to Court Conciliation Services. Estimated fees of \$168,300 for marriage licenses, domestic partnerships, marriage record copies, amendments to marriage and DP records, and waivers of a 3-day waiting period for a marriage license. Passport acceptance fees \$140,000, Passport photo fees \$30,000; Document Recording fees \$4,750,000. Recording copy fees \$250,000. County Clerk Restricted Fund Carryover Revenue \$200,400 and Fees \$150,000 pursuant to ORS 205.320(2). Fees for filing a Board of Property Tax (BoPTA) Appeal \$16,200. BoPTA is allocated \$20,939 of the \$3,079,265 County Assessment Function Funding Assistance (CAFFA) Grant.

Significant Program Changes

Last Year this program was: FY 2022: 72025A DART County Clerk Functions

In FY23, an Assessment & Taxation Technician 1 added to the Recording team as the need of additional support to reliably deliver results was apparent. The recording numbers have remained consistently high, 180,000+ for both 2020 and 2021 calendar years. Ownership transfers also increased 20% in the calendar year 2021. Since August 2020 the team has relied on a full-time temporary position to help fill the gaps in coverage. The permanent position allows the team to perform all duties, not only fill the gaps, as a temp position is only delegated specific tasks due to the temporary nature of the position. This position is funded within existing general fund allocation by shifting available DART resources, with .60 FTE allocated to Program Offer 72025 County Clerk Functions and .40 FTE to Program Offer 72026 Ownership & Parcel Management.

Department: County Management

Program Contact: Tim Mercer

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Ownership & Parcel Management Program, within the Division of Assessment, Recording, and Taxation (DART) is responsible for making real property ownership changes, adding sale information to the tax roll, and maintaining property information and property tax roll descriptions. Through examination of recorded and unrecorded documents, this program verifies the documentation and ensures that the documentation is acceptable for ownership transfer and processing. Program staff provide direct customer service for both the public and internal staff.

Program Summary

The Ownership & Parcel Management Program, within the Division of Assessment, Recording and Taxation (DART), updates and maintains the ownership records and property information for real property tax accounts. Recorded documents, such as deeds, contracts and assignments and unrecorded documentation, such as marriage records, court orders, and death certificates, are used to update the tax roll. Accurate ownership information is essential for DART programs to ensure that tax statements and various notices are sent to the correct party. Additionally, the group processes voucher actions of partition plats, subdivisions, condominiums, and property line adjustments. This information is also used for the production of county maps. Property sales are utilized by the Valuation Section in the process of updating property values. Developed databases enable related work units to access shared data, thereby reducing transfer time and the need for paper records. The group also maintains a transaction file for complex transfers, which is maintained for permanent retention on microfilm. The Program teams interface with the public through the organization's soft phone system, at the public counter, through mail, and by email. The Ownership team also maintains a Digital Research Room for the public to access records through a database.

During FY21, the program made appointments available for customers to bring in plats and other documents to be recorded in order to make certain that services were still provided. The team met the customer outside of the building to ensure safety and adhere to the building closure. Also, since the Digital Research Room was closed during FY21 the team provided alternative online resources for customers to access records. The Digital Research Room opened to the public in July of 2020 to appointment and limited walk-in service.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of ownership changes processed	25,371	30,000	28,500	25,000
Outcome	Average number of days to complete ownership changes	24	5	20	18

Performance Measures Descriptions

The "Number of Ownership Changes Processed" is a combination of ownership changes processed from actual recorded deeds and ownership changes transferred with unrecorded documents (approximately 5% of transfers are from unrecorded documentation). The "Average Number of Days to Complete Ownership Changes" is tracked manually by staff by logging both the date the work is begun and the date of completion. Those numbers are then combined and divided by the actual number of working days in the fiscal year.

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 92-93,100,198-199,205,222,306-308,457,477-478. Additionally, ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Department of Revenue (DOR). Through the CAFFA Grant process described in ORS 294.175, the DOR determines the acceptable level of assessment and taxation (A&T) staffing. The DOR has determined that DART staffing is already at the minimally acceptable level to perform their A&T functions. Any reduction to this program may jeopardize this grant revenue.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$768,804	\$0	\$795,480	\$0
Contractual Services	\$300	\$0	\$300	\$0
Materials & Supplies	\$1,150	\$0	\$1,150	\$0
Internal Services	\$126,366	\$0	\$136,122	\$0
Total GF/non-GF	\$896,620	\$0	\$933,052	\$0
Program Total:	\$896,620		\$933,052	
Program FTE	7.20	0.00	7.60	0.00

Program Revenues				
Intergovernmental	\$172,739	\$0	\$177,058	\$0
Total Revenue	\$172,739	\$0	\$177,058	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures. Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265. Allocated \$177,058 to DART Ownership & Parcel Management program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72026 DART Ownership & Parcel Management

During FY 2022 an Office Assistant 2 position was reclassified to an Assessment & Taxation Technician 2. The Assessment & Taxation Technician 2 will be hired and join the Customer Service, Recording, and Parcel Management teams, and fill a gap that was identified. This new A&T Tech 2 will be an essential link between the three teams by overseeing the scheduling software, compiling statistical data, and overseeing financial reconciliation for all three groups. For FY23, an A&T Technician 1 permanent position was funded within existing general fund allocation by shifting available DART resources, with .40 FTE allocated to Program Offer 72026 Ownership & Parcel Management, and .60 FTE to Program Offer 72025 County Clerk Functions.

Department: County Management

Program Contact: Tim Mercer

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Tax Revenue Management Program administers the County Tax Collector responsibilities. The program manages the billing, collecting, accounting, and distributing of property tax revenues and assessments for over 60 Multnomah County taxing districts and several state agencies. Revenue from interest on past-due taxes is also accounted for and a portion distributed to the County Assessment and Taxation Fund.

Program Summary

The Tax Revenue Management Program's goal is to ensure the timely, equitable, and accurate billing, collection, accounting, and distribution of property tax revenues in accordance with Oregon Revised Statutes. The Tax Revenue Management Program provides responsive, accurate, quality customer service to taxpayers and other government agencies while complying with property tax laws. The program sends property tax statements; collects current and delinquent real and personal property taxes and fees; issues property tax refunds; distributes tax revenues to taxing districts; and performs accounting, auditing, and reporting services. The program processes foreclosures, tax roll corrections, bank adjustments, senior and disabled citizen tax deferral applications, and manufactured structure ownership changes. Over 345,000 tax statements are issued and almost 400,000 payment and accounting transactions are processed annually, resulting in the distribution of roughly \$2 billion. Most directly this program works with the property owners of Multnomah County. Indirectly, this program serves the work of property tax collection and distribution. Property taxes account for more than 60% of the County's General Fund revenues. The program has recently taken steps to better serve non-English speaking property owners by translating the Property Tax Guide into multiple languages. We also have translation services for in-person and phone interactions. We have taken additional steps to make our information and communication more accessible through the use of plain language, reducing the use of jargon and legal terms. While we have considerable constraints based on Oregon Revised Statutes, we utilize client feedback and unmet needs to inform changes to our processes, communication, and interfaces. We have taken many steps to implement changes based on this feedback. One example of this is the utilization of taxpayer feedback as part of the procurement, design, and implementation of our new payment processing system.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Property Tax Statements Issued/Mailed	345,856	350,000	345,000	346,000
Outcome	Percentage of Current Year Property Taxes Collected	98.66%	98.5%	98.5%	98.5%
Outcome	Tax Collected Via Electronic Payment (in millions of dollars)	289.5	255.0	352.0	350.0

Performance Measures Descriptions

Due to the pandemic and concerns about the postal system, as well as our new online payment system and our marketing efforts, we saw a dramatic increase in the number of taxpayers paying online in FY21. In FY22, that number continues to increase at a slower rate. We expect FY23 to potentially level off.

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 311 and 312. Additionally, 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 (A&T) staffing. Any reduction to this program may jeopardize this grant revenue. The County as an agent of the State carries out the functions under ORS 446.566 to ORS 446.646 related to mobile home ownership document transactions and trip permits.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$1,601,417	\$0	\$1,678,481	\$0
Contractual Services	\$186,595	\$0	\$187,320	\$0
Materials & Supplies	\$28,660	\$0	\$30,253	\$0
Internal Services	\$474,238	\$0	\$523,051	\$0
Total GF/non-GF	\$2,290,910	\$0	\$2,419,105	\$0
Program Total:	\$2,290,910		\$2,419,105	
Program FTE	13.40	0.00	13.40	0.00

Program Revenues				
Fees, Permits & Charges	\$460,000	\$0	\$453,000	\$0
Intergovernmental	\$321,145	\$0	\$329,173	\$0
Other / Miscellaneous	\$5,500	\$0	\$5,500	\$0
Total Revenue	\$786,645	\$0	\$787,673	\$0

Explanation of Revenues

Participation in the statewide County Assessment Function Funding Assistance (CAFFA) Grant reimburses approximately 15% of program expenditures. Grant amounts vary depending upon the state-wide CAFFA pool and Multnomah County's allocated percentage. Multnomah County's share is estimated at \$3,079,265, with \$329,173 allocated to DART Tax Revenue Management Program. Program revenues of \$453,000 are service fees required by Oregon Revised Statutes and County Fee Ordinance, are based on historical averages, and include foreclosure publication fees, title search fees, exemption late filing fees, delinquent personal property tax warrant, and warrant recording fees, manufactured structure ownership transfer fees and miscellaneous tax collection and copy fees. The remaining Program support is provided by County General Fund revenue.

Significant Program Changes

Last Year this program was: FY 2022: 72027 DART Tax Revenue Management

Legal / Contractual Obligation

Functions in this program are required under Oregon Revised Statutes (ORS) Chapters 86,92-93,100,198-199,222,227,271,274-275,306-308,312,368,457,477-478. Through the County Assessment Function Funding Assistance (CAFFA) Grant process described in ORS 294.175, the Oregon Department of Revenue (DOR) has determined Multco's A&T staffing to be adequate to meet ongoing statutory needs; however, DOR staffing guidelines are indicating a deficiency in recommended FTE within assessment areas including GIS/Cartography.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$688,945	\$0	\$707,152	\$0
Contractual Services	\$300	\$0	\$300	\$0
Materials & Supplies	\$12,524	\$0	\$12,524	\$0
Internal Services	\$119,734	\$0	\$192,817	\$0
Total GF/non-GF	\$821,503	\$0	\$912,793	\$0
Program Total:	\$821,503		\$912,793	
Program FTE	5.25	0.00	5.25	0.00

Program Revenues				
Intergovernmental	\$126,574	\$0	\$130,021	\$0
Total Revenue	\$126,574	\$0	\$130,021	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures. Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's annual share of CAFFA is estimated at \$3,079,265, with \$129,021 allocated to DART GIS Cartography Program. \$1,000 in revenue pursuant to IGA with the State of Oregon for transfer of GIS data to State. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72028 DART GIS/Cartography

With the County's COVID-19 response, teleworking has dramatically increased the time necessary to update and maintain the statutorily required tax maps. With the variability with home internet service providers, VPN server connections, and overall regional demand upon critical infrastructures, we have adjusted team and individual priorities and goals to continue to thrive and be successful in the upcoming year.

Department: County Management **Program Contact:** Larry Steele
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Assessment Performance Analysis Unit (APA), within the Division of Assessment, Recording and Taxation (DART) is responsible for annual adjustments to Real Market Value resulting in assessed value upon which taxes are calculated and levied for the benefit of all Multnomah County taxing districts. Analysts develop and publish the annual Sales Ratio Study as required by statute. APA acts as the audit function for all valuation processes.

Program Summary

The Assessment Performance Analysis (APA) Unit links to DART appraisal and other programs and their contributions. Appraisal Data Analysts analyze sales, trends and other market data used to monitor, maintain and report valuation performance regarding Residential, Business Personal Property, Commercial, Multi-Family, and Industrial Appraisal models. The APA Unit adjusts Real Market Values of all property in the County and publishes the annual Sales Ratio Study that evaluates and reports on the effectiveness of appraisal programs to the Oregon Department of Revenue. The program assists in answering public and media questions about property values, contributing to the public's perception of fairness in assessing and collecting property taxes. APA performs an independent audit function for all valuation processes, projects and functions.

We have transitioned to more flexible, technological, customer focused solutions that provide for safe, effective remote contact. This is providing the same level of customer service while balancing the needs and safety of staff and the community.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of Projects Maintained - Includes mandated Ratio Study	52	19	52	52
Outcome	Number of Appraisal Neighborhoods in Statutory Compliance (ORS 308.232)	98%	95%	95%	95%

Performance Measures Descriptions

The output measure called "Number of Projects" refers to the many specific annual studies and reports completed by the team, including the largest: Performance Measure #2 - outcome - Ratio Study.

Legal / Contractual Obligation

Functions in this program are regulated under Oregon Revised Statutes (ORS) Chapters 92,205,294,305,306,307,308,308A,309,310 and 321 . Through the County Assessment Function Funding Assistance (CAFFA) Grant process described in ORS 294.175, the DOR determines the acceptable level of staffing. According to the DOR, Multco's assessment and taxation staffing is adequate to meet ongoing statutory needs; however, DOR staffing guidelines are indicating a deficiency in recommended FTE within assessment areas including this unit.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$515,846	\$0	\$542,819	\$0
Contractual Services	\$600	\$0	\$600	\$0
Materials & Supplies	\$15,739	\$0	\$18,901	\$0
Internal Services	\$48,529	\$0	\$69,071	\$0
Total GF/non-GF	\$580,714	\$0	\$631,391	\$0
Program Total:	\$580,714		\$631,391	
Program FTE	3.25	0.00	3.25	0.00

Program Revenues				
Intergovernmental	\$77,808	\$0	\$79,753	\$0
Total Revenue	\$77,808	\$0	\$79,753	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures. Grant amounts 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 \$3,079,265, with \$79,751 allocated to DART Assessment Performance Management Program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72029 DART Assessment Performance Analysis

Department: County Management **Program Contact:** Larry Steele
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Special Programs Group (SPG) is part of the Division of Assessment, Recording and Taxation (DART). SPG is the expert in property tax exemptions and special assessments, tax roll corrections, maximum assessed value (MAV), and floating property returns. Additionally, Special Programs assists the community using various means of communication including by phone, email, and mail. Special Programs provides ongoing training and expertise to other sections within DART.

Program Summary

Special Programs Group (SPG) oversees more than 60 property tax exemption and special assessment programs. These programs provide partial to full property tax relief to qualifying individuals and organizations. Programs established by the state and other jurisdictions affect historic properties, charitable non-profits, fraternal and religious organizations, disabled veterans, and numerous others. SPG receives and makes eligibility determinations on more than 1,000 applications annually for property tax exemptions.

Properties owned by government entities are exempt under Oregon Statute. However, it is common for government entities to lease portions of their properties to nongovernment organizations. The space leased is subject to property taxes. SPG determines what portions of the government owned buildings are subject to property taxes.

SPG serves as the subject matter expert on the tax roll correction process; providing guidance and training to DART valuation sections. SPG corrects the certified tax roll under specific circumstances including property tax appeal resolution, data entry errors, qualified impacts to value due to Act of God incidents, and others.

In 1997, Oregon voters changed the method used to calculate property taxes, which required the calculation of each property's Maximum Assessed Value (MAV). MAV is the basis for determining taxable assessed value for a property and often involves complex calculations. SPG is the division authority on MAV and the advisor to DART sections on anything related to MAV. SPG calculates all MAV changes related to property tax exemption or special assessment, property actions such as divisions of property or lot line adjustments, or property that was demolished or destroyed. The SPG team determines and reallocates MAV for hundreds of properties annually.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Exempt Accounts Reviewed and Processed for the Current Tax Roll	6,822	7,000	6,500	7,000
Outcome	Total Exempt Accounts Monitored	33,130	34,000	33,000	33,500
Output	Total Number of Accounts Processed for Prior Tax Roll (roll corrections)	1,687	2,000	1,500	1,700

Performance Measures Descriptions

Oregon Revised Statute (ORS) requires all property to be valued according to market as accurate market values directly relate to the bonding capacity and general obligation bond tax rates for taxing districts. Specific property tax exemptions are allowed by law. Measurements indicate exempt and specially assessed properties are accurately assessed and tax rolls properly maintained.

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 calculation process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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. Current DART staffing is minimally adequate to perform statutory functions.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$922,938	\$0	\$1,083,306	\$0
Contractual Services	\$1,800	\$0	\$500	\$0
Materials & Supplies	\$11,147	\$0	\$12,789	\$0
Internal Services	\$115,525	\$0	\$123,865	\$0
Total GF/non-GF	\$1,051,410	\$0	\$1,220,460	\$0
Program Total:	\$1,051,410		\$1,220,460	
Program FTE	7.25	0.00	8.25	0.00

Program Revenues				
Fees, Permits & Charges	\$0	\$0	\$2,703	\$0
Intergovernmental	\$173,941	\$0	\$178,289	\$0
Total Revenue	\$173,941	\$0	\$180,992	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures; Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265 with \$178,289 allocated to DART Property Assessment Special Programs. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72030 DART Property Assessment Special Programs

1.00 FTE Assessment & Taxation Technician 2 Position 703805 was transferred from Program 72034 DART Residential Property Appraisal to Program 72030 DART Property Assessment Special Programs

Department: County Management

Program Contact: Tim Mercer

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Personal Property Assessment Program, within the Division of Assessment, Recording, and Taxation (DART), is responsible for processing all taxable Business Personal Property returns received. Personal Property represents 3% of the value upon which taxes are levied for the benefit of all Multnomah County taxing districts.

Program Summary

The Personal Property Assessment Program's goal is to ensure proper filing amongst all businesses within the county, to create assessment records for new taxable business Personal Property accounts, and to maintain the Real Market Value and Maximum Assessed Value of all taxable business Personal Property accounts.

Oregon Revised Statutes require annual filings of the Confidential Personal Property Return form from businesses in the county for property tax purposes. The Personal Property Assessment Program reviews those returns (approximately 22,000 businesses annually) for accuracy & completeness and applies appropriate depreciation factors to each business asset on each return. Technicians in this program also conduct research and discovery of new businesses and assets omitted from the assessment roll. Appraisals are performed to defend values under appeal. Technicians in this program also conduct account maintenance including ownership information, address information, and more. This program also conducts significant outreach, communication, and education efforts to help taxpayers understand their obligations and to assure the assessment records are accurate.

Under the Measure 50 tax limitation measure, there is no assumption of a 3% increase in personal property taxable value; instead, each business is required to annually report existing taxable property. Failure to monitor this process will result in the loss of taxable assessed value and tax revenue. Accurate values maximize the level of tax assessment allowed under Measure 5 and Measure 50 tax limitation measures.

Most directly this program works with the business representatives of Multnomah County. Indirectly, this program serves the work of property tax assessment. Property taxes account for more than 60% of the County's General Fund revenues. The program has recently taken steps to better serve non-English speaking business representatives, by translating informational documents into multiple languages.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of Accounts Processed, Coded and Valued	15,256	15,000	15,2894	15,900
Outcome	Assessed Value in Millions of Personal Property Value Placed on the Tax Roll	\$2,668	\$2,550	\$2,673	\$2,700
Efficiency	Percentage of Accounts Filing Electronically	16.4%	17%	18.4%	19%

Performance Measures Descriptions

Due to the impacts of COVID-19 on the business community, we expected a spike in business closures in FY21, but that never materialized.

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 calculation process. ORS 306.115 assigns statewide general supervision of the property tax system to the Oregon Dept. 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 (A&T) staffing. Current DART staffing is minimally adequate to perform statutory functions. Any reduction to this program may jeopardize the grant revenue.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$924,521	\$0	\$798,007	\$0
Contractual Services	\$12,115	\$0	\$12,395	\$0
Materials & Supplies	\$4,296	\$0	\$3,364	\$0
Internal Services	\$224,970	\$0	\$202,673	\$0
Total GF/non-GF	\$1,165,902	\$0	\$1,016,439	\$0
Program Total:	\$1,165,902		\$1,016,439	
Program FTE	7.00	0.00	6.00	0.00

Program Revenues				
Intergovernmental	\$167,933	\$0	\$147,497	\$0
Total Revenue	\$167,933	\$0	\$147,497	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures; Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265, with \$147,497 allocated to DART Personal Property Assessment Program. The remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72031 DART Personal Property Assessment

Transferred 1.00 FTE position 704432 from DART Personal Property Assessment program (72031) to DART Commercial & Industrial Property Appraisal program (72033).

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310 and 321 and Oregon Administrative Rules regulate the assessment and property tax calculation process. Through the County Assessment Function Funding Assistance (CAFFA) Grant process described in ORS 294.175, the DOR determines an acceptable level of staffing. Current DART staffing is minimally adequate to perform statutory functions.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$3,153,284	\$0	\$3,479,609	\$0
Contractual Services	\$2,525	\$0	\$1,975	\$0
Materials & Supplies	\$119,298	\$0	\$131,524	\$0
Internal Services	\$364,792	\$0	\$383,109	\$0
Total GF/non-GF	\$3,639,899	\$0	\$3,996,217	\$0
Program Total:	\$3,639,899		\$3,996,217	
Program FTE	22.50	0.00	23.50	0.00

Program Revenues				
Intergovernmental	\$539,547	\$0	\$577,362	\$0
Total Revenue	\$539,547	\$0	\$577,362	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures; Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265, with \$577,362 allocated to DART Commercial & Industrial Property Appraisal Program. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72033 DART Commercial & Industrial Property Appraisal

In accordance with public health guidelines and out of an abundance of caution, we have limited in person contact with taxpayers to exterior site visits. Interior site visits are done by appointment only. As a result, using various public data and GIS sources, staff completed a greater number of value review assignments as desk reviews rather than full property site visits.

Transferred 1.00 FTE position 704432 from DART Personal Property Assessment program (72031) to DART Commercial & Industrial Property Appraisal program (72033).

Department: County Management **Program Contact:** John Botaitis
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Residential Property Appraisal Program, within the Division of Assessment, Recording and Taxation (DART), is responsible for valuing and appraising all residential property, residential property converted to commercial use, personal property floating and manufactured homes and all land specially assessed for use as farm, forest and open space. The Residential valuation section is responsible for valuing and maintaining accounts that represent approximately 60% of the total taxable assessed value, upon which taxes are levied for the benefit of all Multnomah County taxing districts and residents.

Program Summary

This program is responsible for maintaining accurate property inventories and Real Market Values for 261,000 Real and Personal Property accounts including: Single and 2-4 family, Condominiums, Manufactured, Floating homes, Farm Forest, and small General Commercial Use properties. A total of 22,444 valuation assignments were completed for FY2021 requiring review and processing, largely issued by local jurisdictions. In addition to these assignments, a few hundred value appeals are reviewed annually.

Maintaining accurate Real Market Value (RMV) on properties directly affects essential funding for all taxing districts. This program ensures that all Residential property is valued within State of Oregon standards and taxed under applicable laws. Property taxes account for approximately 60% of the County's General Fund revenues and directly support a number of community-based programs that depend on this revenue. The more properties that can be reviewed by staff each year, the more accurate the inventory and resulting values are. The performance measures for the program specifically seek to measure both the volume of accounts reviewed as well as the relevance of the value for each account as it relates to the market.

Taxpayer access to the program has been enhanced to offer options such as; appointments for site visits, telephone consultations, virtual property inspections as well as electronic exchanges of information and digital photography; this also includes improved website capabilities.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Accounts Appraised	22,444	18,000	18,000	18,000
Outcome	New Taxable Real Market Value Exception (in millions of dollars)	\$710	\$800	\$700	\$700
Outcome	% Neighborhood with COD Compliance	100%	100%	100%	98%

Performance Measures Descriptions

Estimated reduction in Accounts Appraised is a byproduct of COVID and the inability to conduct property inspections. Oregon law requires property appraisals to be at 100% of Market Value as of January 1 of each year. The Coefficient of Dispersion (COD) is a key measure and failure to meet standards can result in loss of CAFFA grant revenue which funds assessor office operations.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) Chapters 92, 205, 294, 305, 306, 307, 308, 308A, 309, 310 and 321 and Oregon Administrative Rules regulate the assessment and property tax calculation process. Through the County Assessment Function Funding Assistance (CAFFA) Grant process described in ORS 294.175, the DOR determines an acceptable level of staffing. Current DART staffing is minimally adequate to perform statutory functions.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$4,902,657	\$0	\$5,098,512	\$0
Contractual Services	\$4,600	\$0	\$2,400	\$0
Materials & Supplies	\$117,064	\$0	\$118,383	\$0
Internal Services	\$605,965	\$0	\$625,382	\$0
Total GF/non-GF	\$5,630,286	\$0	\$5,844,677	\$0
Program Total:	\$5,630,286		\$5,844,677	
Program FTE	37.50	0.00	36.50	0.00

Program Revenues				
Intergovernmental	\$899,145	\$0	\$921,625	\$0
Total Revenue	\$899,145	\$0	\$921,625	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures; Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265. Allocated \$921,625 to DART Residential Appraisal Program. Remaining Program support is from General Fund Revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72034 DART Residential Property Appraisal

In accordance with public health guidelines and out of an abundance of caution, we have limited in person contact with taxpayers to exterior site visits. Interior site visits are done by appointment only. As a result, using various public data and GIS sources, staff complete a greater number of value review assignments as desk reviews rather than full property site visits. 1.00 FTE Assessment & Taxation Technician 2 Position 703805 was transferred from Program 72034 DART Residential Property Appraisal to Program 72030 DART Property Assessment Special Programs

Department: County Management

Program Contact: Larry Steele

Program Offer Type: Support

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

The Applications Support (App Support) Program designs, develops, and deploys technology solutions for the entire Division. App Support is also responsible for managing DART's application software and hardware through configuration, support and collaboration with external IT vendors and internal business partners. Furthermore, App Support performs the functions necessary to produce the certified annual tax roll, which includes calculating tax rates, taxes, and producing tax statements. As a result of these efforts, this program also maintains vital information necessary for both internal and external data requests, essential in developing statutorily required reports and providing transparency to Multnomah County stakeholders.

Program Summary

DART's Applications Support (App Support) Program designs, develops, and deploys technology solutions, through collaboration with IT business partners that create efficiencies, standardizations, improve data integrity, and generate sustainability across the entire division.

App Support performs the functions of extending and certifying the annual tax roll; including calculating tax rates and taxes, producing tax statements, and producing reports required by the Oregon Department of Revenue. As a result, the program assists in answering public and media questions about property tax bills, contributing to the accountability factor of the public's perception of fairness in assessing and collecting property taxes. In addition to certifying the annual tax roll, the Program responds to requests for information by developing data files for both internal and external customers. The Program manages the working relationship with the application software and hardware vendors, as well as the County IT business partners; including consulting on contract formulation, implementation, support, and project management. The Program answers user questions, resolves problems, and provides expert recommendations on the effective use of the Division's business application systems. Additionally, the App Support team manages and promotes the Division's public facing website, designs and implements accessibility features; procures, distributes and supports software solutions to create accessible video content for internal and external education materials.

The community's access to the program has been modified to include more flexible, technological, customer focused solutions that provide for safe, effective remote contact. This is providing the same level of customer service while balancing the safety of staff and the needs of the community we serve.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of requests and support activities	3,500	3,600	3,500	3,500
Outcome	% of Requests Associated with Program Revenue	4%	4%	4%	4%
Output	Tax Statements Generated En Masse	342,532	350,000	350,000	350,000

Performance Measures Descriptions

The Number of Requests & Support Activities measures an Activity representing a single request or contact, even if that request is for 5 data files to be created and sent to the client. The percent of Requests Associated with Program Revenue indicates the portion of the program's work activities associated with a portion of our revenue. Tax Statement Production numbers can fluctuate due to factors beyond the control of the Assessor.

Legal / Contractual Obligation

Functions in this program are regulated under Oregon Revised Statutes (ORS) Chapters 92,205,294,305,306,307,308,308A,309,310 and 321 . Through the County Assessment Function Funding Assistance (CAFFA) Grant process described in ORS 294.175, the DOR determines the acceptable level of staffing. According to the DOR, Multco's assessment and taxation staffing is adequate to meet ongoing statutory needs; however, DOR staffing guidelines are indicating a deficiency in recommended FTE within assessment areas including this unit.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$936,022	\$0	\$989,387	\$0
Contractual Services	\$9,500	\$0	\$8,300	\$0
Materials & Supplies	\$424,263	\$0	\$449,175	\$0
Internal Services	\$354,851	\$0	\$286,815	\$0
Total GF/non-GF	\$1,724,636	\$0	\$1,733,677	\$0
Program Total:	\$1,724,636		\$1,733,677	
Program FTE	6.25	0.00	6.25	0.00

Program Revenues				
Intergovernmental	\$149,908	\$0	\$153,655	\$0
Other / Miscellaneous	\$40,000	\$0	\$40,000	\$0
Total Revenue	\$189,908	\$0	\$193,655	\$0

Explanation of Revenues

Participation in the Oregon Department of Revenue County Assessment Function Funding Assistance (CAFFA) Grant provides reimbursement of approximately 15% of Assessment & Taxation program expenditures. Grant amounts vary depending upon the overall state-wide CAFFA pool and the allocated percentage to each participating county. Multnomah County's total annual share of CAFFA is estimated at \$3,079,265 with \$153,655 allocated to DART Applications Support program. Program revenue of \$40,000 is from service fees for access to Assessment & Taxation information (subscription website user fees) and requests for Assessment and Taxation data files. Service fees are authorized by Department of County Management Fee Ordinance. Fees are projected based upon historical trends. Remaining Program support is provided by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72037 DART Applications Support

There will be an implementation of an E-File product that will have an impact on the budget.

Department: County Management **Program Contact:** Jeffrey Brown
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The Tax Title Program, within the Division of Assessment, Recording and Taxation (DART), is responsible for project management, maintenance supervision, portfolio strategy, and final disposition of the County's tax foreclosed property portfolio. The Program's highest priority is foreclosure avoidance prior to County ownership and occupant support throughout the process. Vulnerable populations and historically disadvantaged groups, especially during the challenges of Covid-19, are supported with appropriate resources using best practices. Less than 5% of the current portfolio (~210) properties have improvements or structures. Property dispositions are through public and private sales, government transfers and donations to non-profits.

Program Summary

The County comes into ownership of real property generally once a year (September/October) through the foreclosure of delinquent property tax liens. The tax foreclosed properties are deeded by the Tax Collector to the County as the responsibility of the Tax Title Program and are managed and disposed of pursuant to Multnomah County Code, Chapter 7 as part of the larger portfolio project management. Shortly after the properties are deeded to the County they may become available for repurchase by qualified former owners of record. In FY 2021, special consideration was given for repurchase by former owners due to the health, safety, housing, and economic conditions brought about by the COVID-19 pandemic. The same consideration will continue into FY 2022. The program consults with other County departments and community agencies for housing, services and support for occupants of tax foreclosed properties. Maintenance of the properties is performed through agreement and reimbursement to Department of County Assets, Facilities and Property Management Division.

The Tax Title Program researches and assesses properties received to determine their highest and best use. The program will identify property to be sold at public sale in cooperation with the Multnomah County Sheriff's Office, a private sale or to make available for donation to governments or non-profits. Effective January 1, 2016, ORS 275.275 was amended to redirect the distribution of proceeds from sales, net of program expenses. All net proceeds will be credited to the General Fund, Sub-Fund 10030 Tax Title: Affordable Housing, for the following purposes: (i) Funds for housing placement and retention support services for youth and families with children; (ii) Flexible rental assistance to place youth and families with children into housing; or (iii) Funds to develop new low income housing that is affordable to youth and families with children with 30 percent or lower median family income.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Properties remaining in Tax Title Inventory	216	205	208	205
Outcome	Properties placed back on the tax roll & into community use	5	20	11	15
Outcome	Revenue credited to General Fund, Sub-Fund	\$621,265	\$100,000	\$100,000	\$100,000

Performance Measures Descriptions

The goal of the program is to first apply rigorous foreclosure avoidance measures and, if deeded, reinstate tax foreclosed properties to the tax roll or into public use. At the end of every budget year the tax foreclosed property revenues are totaled, operating expenses and pass-through payments are accounted for, and the balance of revenue will be disbursed to Multnomah County General Fund, Sub-Fund 10030 Tax Title: Affordable Housing.

Legal / Contractual Obligation

Oregon Revised Statutes (ORS) 275 details how counties are to manage and dispose of tax foreclosed properties. ORS 312 details the foreclosure process & responsibilities of the county including guidance on how the redemption period can be reduced when there is evidence of waste and abandonment. ORS 271 provides information concerning the transfer of foreclosed properties to non-profits & government agencies. ORS 98 details procedures concerning abandoned property & vehicles at foreclosed property. County Code Chapter 7 states how tax foreclosures are to be managed and disposed.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$230,111	\$0	\$239,635	\$0
Contractual Services	\$399,400	\$0	\$384,992	\$0
Materials & Supplies	\$13,078	\$0	\$13,278	\$0
Internal Services	\$107,411	\$0	\$112,292	\$0
Total GF/non-GF	\$750,000	\$0	\$750,197	\$0
Program Total:	\$750,000		\$750,197	
Program FTE	1.60	0.00	1.60	0.00

Program Revenues				
Other / Miscellaneous	\$750,000	\$0	\$750,000	\$0
Total Revenue	\$750,000	\$0	\$750,000	\$0

Explanation of Revenues

The Program is financially self sustaining. Sales of Tax Foreclosed Properties (public sales, auctions, repurchases, and private sales) are estimated at approximately \$750,000 for FY 2023. Prior to deeding property to Multnomah County, the program directs a rigorous foreclosure avoidance outreach. If foreclosure avoidance efforts are successful it can significantly reduce the number of properties deeded to, and subsequently sold by, Multnomah County. The FY 2023 revenue estimate reflects the likelihood of continued success in the program's foreclosure avoidance efforts and Covid-19 considerations. If the program's revenues exceed the operating costs, the excess is distributed to Multnomah County Fund 10030 Tax Title: Affordable Housing, in accordance with ORS 275.275, and per formula provided in ORS 311.390.

Significant Program Changes

Last Year this program was: FY 2022: 72038 DART Tax Title

Department: County Management **Program Contact:** Brian Smith
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs: 72044B
Program Characteristics:

Executive Summary

The Construction Diversity and Equity Fund (CDEF) program supports recruitment and retention of women and minorities in the skilled construction trades. It also supports the competitiveness of State certified minority-owned, women-owned, service-disabled-veteran-owned businesses, and emerging small businesses.

Program Summary

Jobs in the fields of construction offer stable careers that pay wages sufficient to raise a family. As a result of a history of discrimination and other barriers, jobs in these fields have not been available to all people. The CDEF program increases diversity, equity, and opportunity in both our construction workforce and business community.

The CDEF program supports three initiatives.

- (1) It funds Bureau of Labor and Industries (BOLI) certified pre-apprenticeship programs. These programs are an important gateway into the trades. CDEF supports their recruitment of women and minorities.
- (2) It funds support and retention services for women and minority apprentices. This recognizes that every individual has different barriers that may disrupt their employment. Employers and unions refer apprentices to one of the County's three contractors who provide the services. Providing tools, safety equipment, or various support services helps ensure success on the job. Contractors provide qualitative feedback from the apprentices to gauge program impacts.
- (3) It funds technical help, mentoring and training for State certified minority-owned, women-owned, service-disabled-veteran-owned businesses, and emerging small businesses. Within that group, we emphasize serving construction-related professional services or contracting businesses. Certified firms apply online for support. We match them with one of four contractors to provide the help. Both contractors and certified firms provide feedback on the success of the engagement. This feedback is provided through monthly online surveys from both of these groups.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of workers served in BOLI Pre-Apprenticeship Programs	N/A	15	0	15
Outcome	Number of workers able to maintain employment due to receiving direct support and retention services.	N/A	30	14	25
Output	Number of State Certified firms receiving technical assistance, mentoring, and training.	N/A	30	14	25

Performance Measures Descriptions

Due to COVID, pre-apprenticeship programs were largely shut down. We expect these to reopen in FY23. We believe that direct support for both workers and State Certified firms was depressed due to COVID.

Legal / Contractual Obligation

Multnomah County Board Resolution No.2018-024 - Resolution Approving Amendments to Public Contract Review Board Rules Division 60 on Equal Opportunity in Public Contracting, Effective July 1, 2018

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$137,450	\$0	\$215,000	\$0
Total GF/non-GF	\$137,450	\$0	\$215,000	\$0
Program Total:	\$137,450		\$215,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Other / Miscellaneous	\$65,000	\$0	\$45,000	\$0
Beginning Working Capital	\$72,450	\$0	\$170,000	\$0
Total Revenue	\$137,450	\$0	\$215,000	\$0

Explanation of Revenues

The program has two sources of funding. First, the County pays (1%) of construction costs into the fund. Second, any Liquidated Damages paid by construction contractors are part of the fund. Liquidated damages are a sum contractors pay to the County if they do not meet contracted inclusion goals for women, minorities and apprentices.

Significant Program Changes

Last Year this program was: FY 2022: 72044 FRM Construction Diversity and Equity

Spending of CDEF funding has not been as aggressive as we had hoped due to COVID. Specifically, the pre apprentice training programs have had a difficult time conducting classes, and State Certification Office for Business Inclusion and Diversity (COBID) certified business assistance applications have lagged.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$0	\$200,000	\$0
Total GF/non-GF	\$0	\$0	\$200,000	\$0
Program Total:	\$0		\$200,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is funded through General Fund revenues.

Significant Program Changes

Last Year this program was:

The annual funder commitment will be for a 5-year period.

Department: County Management **Program Contact:** Heather Drake
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Workday is part of the County’s enterprise resource planning system (ERP). Workday is designed to be managed and supported by business operational staff in Central Finance. The ERP Finance Support team provides strategic and operational leadership; maintains, troubleshoots, and enhances Workday finance functionality; and provides operational and learning support to finance staff to help the County use our ERP system to its fullest potential.

Program Summary

The ERP Finance Support team maintains, troubleshoots, and enhances Workday finance functionality to help the County use the ERP system to its fullest potential. This program supports planning, design, build, and testing of Workday configuration and custom reports. It maintains the system’s foundational finance data model. It includes a variety of operational and learning support services that range from responding to individual end user questions to preparing online self-service learning materials to delivering in-person training sessions. It supports active participation in the larger Workday Community and direct advocacy with Workday for functionality enhancements that would benefit County operations.

Workday functionality supported by this program offer includes: Allocations, Banking and Settlement, Business Assets, Customer Accounts (Accounts Receivable), Facilities Tasks, Finance Data Model, Financial Accounting, Grants Management, Inventory, Procurement, Projects, Project Assets, and Supplier Accounts (Accounts Payable).

The ERP Finance Support team performs the following key functions:

- (1) Analyze, design, build, test, and configure all changes made to the existing system, including features from mandatory, twice-yearly Workday system updates.
- (2) Maintain ERP’s foundational finance data model.
- (3) Maintain system business processes and security approach to establish internal controls over finance transaction processing.
- (4) Create new custom reports and maintain existing custom reports.
- (5) Meet regularly with finance stakeholder groups to create transparency and stakeholder involvement in decision making about which configuration projects will best meet the County’s business needs.
- (6) Provide operational and learning support to County finance users that creates a culture where people feel safe asking questions and trust they will receive quick and accurate assistance.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of customer tickets processed	1,208	1,200	1,400	1,300
Outcome	Percentage of features in mandatory, twice-yearly Workday updates analyzed and successfully configured	> 95%	> 95%	> 95%	> 95%
Output	Number of learning support sessions provided	41	35	35	30
Outcome	Percentage of finance user survey respondents satisfied with support provided	N/A	> 90%	80%	> 90%

Performance Measures Descriptions

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$830,199	\$0	\$872,517	\$0
Contractual Services	\$25,000	\$0	\$25,000	\$0
Materials & Supplies	\$39,713	\$0	\$39,713	\$0
Internal Services	\$70,609	\$0	\$61,927	\$0
Total GF/non-GF	\$965,521	\$0	\$999,157	\$0
Program Total:	\$965,521		\$999,157	
Program FTE	4.00	0.00	4.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72046 FRM Workday Support - Finance

Department: County Management **Program Contact:** Heather Drake
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The ERP Finance Support team supports Workday as the County's accounting system of record. It provides strategic and operational leadership; maintains, troubleshoots, and enhances Workday finance functionality; and provides operational and learning support to finance staff to help the County use our ERP system to its fullest potential. This program offer requests ongoing General Fund revenue for one new position. It builds capacity to meet the increasing reporting needs of County departments and undertake key configuration projects that will improve current system functionality.

Program Summary

The ERP Finance Support team maintains, troubleshoots, and enhances Workday finance functionality to help the County use the ERP system to its fullest potential. It supports planning, design, build, and testing of Workday configuration and custom reports. It maintains the system's foundational finance data model. It includes a variety of operational and learning support services that range from responding to individual end user questions to preparing online self-service learning materials to delivering in-person training sessions. It supports active participation in the larger Workday Community and direct advocacy with Workday for functionality enhancements that would benefit County operations.

The initial support model developed in advance of going live with Workday was expected to dedicate approximately 75% of the team's work to system enhancements and improvements and 25% to operational support. We have learned over the last three years that a more realistic breakdown is 75% to operational support and 25% to system enhancements. This has resulted in a significant backlog of key projects needed to meet the increasing reporting needs of County departments and improve current system functionality. Workday's constant pace of releasing improved functionality has also highlighted the need for an additional FTE.

Potential projects include configuration and training for: dashboards for cost center managers; Financial Data Mart to facilitate reporting on County-wide, multi-year data sets; specialized custom reports for new program areas such as Preschool for All, Supportive Housing, and Culturally Specific Services; automated cash flow statements; OfficeConnect for a direct connection between Workday data and Microsoft Excel; system enhancements that empower department staff with more customization options for the reports they run within Workday; and new, focused training courses for data analysts, cost center managers, and other advanced finance report users.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of customer tickets processed	N/A	N/A	N/A	175
Outcome	Percentage of features in mandatory Workday updates analyzed, tested, and successfully configured	N/A	N/A	N/A	> 95%
Outcome	Percentage of finance user survey respondents satisfied with support provided	N/A	N/A	N/A	> 90%
Output	Number of learning support sessions provided	N/A	N/A	N/A	6

Performance Measures Descriptions

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$201,124	\$0
Materials & Supplies	\$0	\$0	\$13,876	\$0
Total GF/non-GF	\$0	\$0	\$215,000	\$0
Program Total:	\$0		\$215,000	
Program FTE	0.00	0.00	1.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was:

Department: County Management

Program Contact: Brian Smith

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs: 72005

Program Characteristics:
Executive Summary

This program offer will fund a Labor Compliance Program to provide education and support for workers and construction contractors on wage theft prevention and will support a volunteer program to interview workers on the jobsite to help ensure they are paid a fair wage. The program offer also includes data infrastructure to assist the County with compliance monitoring.

Program Summary

Wage theft exists when a worker is not paid or is underpaid for their work. Wage theft harms workers by driving down wages and harms honest contractors by making them less competitive. Wage theft is particularly prevalent in the construction industry. According to the Oregon Center for Public Policy, “Between 2015 and 2016, the most recent period of data we analyzed, the construction industry had the second highest number of wage claims as a share of its workforce.” Some wage theft is unintentional (for example, a calculation error) and easily correctable when identified. Other wage theft is intentional and often harms workers who may not report it for fear of losing their jobs. The County Labor Compliance Program supports workers and contractors to ensure workers are getting paid correctly. In addition, the program supports construction project delivery by assembling and analyzing data to ensure contractors are delivering on the workforce equity objectives for the County’s capital projects.

This Labor Compliance Program 1) provides technical assistance and support to ensure that contractors and subcontractors properly classify workers and are in compliance with BOLI labor laws which include Apprenticeship rules and Prevailing Wage laws; 2) ensures that workers on County projects understand their rights related to wage laws, 3) trains and oversees authorized community volunteers to support the County’s verification of certified payroll by interviewing workers at worksites regarding wages, benefits, and hours, and 4) manages and maintains software to enable robust monitoring and reporting on wages and benefits paid on County construction projects.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of volunteers certified by County	20	20	20	20
Outcome	Percent of County construction projects visited by certified volunteers	0%	75%	10%	75%

Performance Measures Descriptions

Since the program implementation in 2019 the program has maintained a steady group of 20 trained site volunteers. However, due to the pandemic shutdown in March 2020, visits by volunteers to County construction sites were suspended. County Risk Management estimates the program could restart volunteer operations as early as May 2022.

Legal / Contractual Obligation

ORS 279C.800 to 279C.870 list the requirements for payment of prevailing wages paid on public works projects.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$124,726	\$0	\$129,848	\$0
Materials & Supplies	\$45,723	\$0	\$24,462	\$0
Total GF/non-GF	\$170,449	\$0	\$154,310	\$0
Program Total:	\$170,449		\$154,310	
Program FTE	1.00	0.00	1.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is funded through General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72047 FRM Labor Compliance

Legal / Contractual Obligation

Multnomah County entered into an Intergovernmental Agreement with the City of Portland. The City of Portland will administer the program on the County's behalf. Administrative functions will include technical assistance to contractors, an online platform for registering diesel-powered equipment covered by the standard, the issuance of equipment decals, and online administrative functions to allow County managers to ensure compliance with the standard on specific projects.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$52,000	\$0	\$53,450	\$0
Total GF/non-GF	\$52,000	\$0	\$53,450	\$0
Program Total:	\$52,000		\$53,450	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Program is supported by General Fund

Significant Program Changes

Last Year this program was: [FY 2022: 72048 FRM Clean Air Construction Standards](#)

Multnomah County residents have the highest exposure to air toxics in the state and are well above national averages for cancer risk and respiratory hazards from air toxics. Soot from older diesel engines is among the most prevalent and harmful airborne toxins in the region. According to the Oregon Department of Environmental Quality (DEQ), the Portland Metro area registers diesel particulate matter (PM) levels above the ambient benchmark concentration set by the state. DEQ estimates the emissions lead to more than 400 premature deaths and \$3 billion in economic losses a year. More than 50 percent of diesel particulate matter in the region comes from construction equipment. People with lower incomes shoulder a disproportionate share of the pollution, as they are more likely to live in denser neighborhoods near congested roadways.

Department: County Management **Program Contact:** Anna Plumb
Program Offer Type: Support **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

The DCM/NOND Human Resources (HR) Team provides the full range of Human Resources (HR) services for the approximately 410 employees (412 FTE) of the Department of County Management (DCM) and all non-departmental agencies, including elected officials, the Office of Diversity and Equity, and the Office of Emergency Management. The DCM/NOND HR team supports all employees through the full employee lifecycle, with a focus on workforce equity and ensuring employees experience safety, trust, and belonging in keeping with County values.

Program Summary

The DCM/NOND Human Resources (HR) Team provides the full range of Human Resources (HR) services for the approximately 410 employees (412 FTE) of the Department of County Management (DCM) and all non-departmental agencies, including elected officials, the Office of Diversity and Equity, and the Office of Emergency Management. The DCM/NOND HR team supports all 410 employees through the full employee lifecycle, with a focus on workforce equity and ensuring employees experience safety, trust, and belonging at work.

The HR team combines strategic planning with professional HR advice and support, serving as a strategic business partner and resource for managers and employees. Areas of support include development and implementation of staffing plans, including creating position descriptions; recruitment and retention; onboarding new employees; performance management for both represented and exempt employees; advice and coaching for employees and managers; HR information systems data entry, complex records management and compliance; timekeeping and e-timesheet training; and review and ensure compliance and interpretation of collective bargaining agreements and County Personnel Rules.

All aspects of Human Resources are directly linked to workforce equity and to employee’s experiences of safety, trust, and belonging. The DCM/NOND HR team focuses on equitable and inclusive practices and policies for all elements of our work. Many of the goals in the Workforce Equity Strategic Plan (WESP) are directly tied to Human Resources actions or programs, and our team’s support and work is fundamental to meeting the organization’s commitments under the WESP during FY 2023.

In FY 2023 the DCM/NOND HR Team will

- Provide focused support to the county’s non-departmental agencies and Department of County Management
- Support the department meeting of all WESP milestones

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Percent of recruitments that are successful*	89%	90%	90%	90%
Outcome	Number of employees provided full range of HR Services	N/A	500	406	412
Outcome	Percent of DCM and NOND employees saying they would recommend working at the county to a friend.	N/A	90	90	90

Performance Measures Descriptions

A successful recruitment is a recruitment that ends in a hire. Measure 3 is based on the Countywide Employee Survey, which is issued to all county employees every two years. The number of employees supported decreased in FY 2022 when the Joint Office of Homeless Services became a separate department but will increase slightly in FY 2023.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$936,139	\$0	\$1,000,677	\$0
Contractual Services	\$5,167	\$0	\$5,167	\$0
Materials & Supplies	\$18,695	\$0	\$19,655	\$0
Internal Services	\$84,542	\$0	\$58,330	\$0
Total GF/non-GF	\$1,044,543	\$0	\$1,083,829	\$0
Program Total:	\$1,044,543		\$1,083,829	
Program FTE	6.00	0.00	6.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

Significant Program Changes

Last Year this program was: FY 2022: 72049A DCM/NonD Human Resources Team

The DCM/NOND HR team stopped supporting the Joint Office of Homeless Services (JOHS) when JOHS became a separate department on July 1, 2021.

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Central HR Classification & Compensation (Class Comp) provides pay and classification structures necessary for the County to offer competitive pay and appealing career paths. Class Comp provides the pay and job profile frameworks that facilitate external competitiveness, ensure internal equity, promote employee retention and support career growth. The team identifies and analyzes job duties and qualifications that define the scope and complexity of work performed. It also researches labor market pay data in support of all unions and management job profiles for the most accurate indicator of prevailing wages and salaries for comparable jobs.

Program Summary

Class Comp aligns practices with County organizational values of safety, trust, and belonging by acting as a neutral function, following procedures established by county code, personnel rules, and collective bargaining agreements to review requests from a centralized perspective. Giving employees the opportunity to have their position reviewed in the reclassification process helps to ensure equity among how positions are classified and compensated.

Class Comp impacts a large percentage of the total County workforce by ensuring positions are allocated at the appropriate level, job profiles are written accurately, and that compensation within our job profile structure is competitive with the public sector market. These efforts ensure equitable work assignments and compensation, which ultimately result in processes that are consistent with the Oregon Equal Pay Act.

Program outcomes are measured for Class Comp based on the number of positions impacted by classification and/or compensation studies, new positions classified, and positions reclassified. Reclassifications and studies directly impact our current workforce and new positions allow for the County to hire staff needed to deliver more effective and new services to the public.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	# of positions reviewed as a result of class/comp studies.	848	500	950	915
Outcome	Percent of total positions reclassified, revised, updated.	30%	17.3%	30.3%	27.6%
Output	# of positions reviewed as a result of individual requests.	702	400	650	550

Performance Measures Descriptions

Output/Outcome measures align to job market factors and the inability to fill vacancies and/or impact on essential public services.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$524,255	\$0	\$552,263	\$0
Contractual Services	\$5,000	\$0	\$5,000	\$0
Materials & Supplies	\$14,100	\$0	\$15,540	\$0
Internal Services	\$9,803	\$0	\$10,090	\$0
Total GF/non-GF	\$553,158	\$0	\$582,893	\$0
Program Total:	\$553,158		\$582,893	
Program FTE	3.00	0.00	3.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues

Significant Program Changes

Last Year this program was: FY 2022: 72050 Central HR Classification & Compensation

Department: County Management

Program Contact: Chris Lenn

Program Offer Type: Innovative/New Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:
Executive Summary

This proposal represents an ongoing investment of 25 internship positions towards our commitment to the Workforce Equity Strategic Plan (WESP) performance metric to place 50 College to County internships countywide annually by 2022.

Program Summary

The College to County Mentorship Program is a workforce pathways initiative that focuses on the development of college students or recent graduates from underrepresented communities by offering paid three-month internship opportunities in County projects across departments. In addition, the program matches participants with mentors who are trained in culturally responsive mentoring and development. The internship assists the students' understanding of the pathways to employment and leadership in various County careers so they may consider Multnomah County for future employment. Since the program started in 2011, College to County has successfully helped 30 internship participants become regular status County employees.

Centralized funding will provide a foundation for County departments to meet our commitment on an annual basis despite fluctuations in budget constraints and differences in budgets across departments. In a recent evaluation of this program, one of the biggest barriers for departments/managers to participate is budgetary constraint or uncertainty.

Ensuring a portion of the program's annual placement goals are funded centrally would provide a more equitable chance that internship opportunities are made available across all departments by filling the funding gap for those departments that may be constrained by budget. Additionally, since the internships take place in the summer months, they run across two budget years. Ongoing funding will ensure that an internship is not displaced midway through the experience.

This program honors and advances the County's commitment to building a diverse workforce, promoting inclusion and being better positioned to fulfill our mission to serve the residents of Multnomah County.

A request and funding process will be maintained by the College to County Program Coordinator & the Talent Acquisition Manager.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of Positions Funded	N/A	25	25	25
Outcome	Participants report the program improved their personal and professional growth	92.3%	80%	94%	80%
Outcome	Participants report increased understanding of how to obtain employment at Multnomah County	89.5%	80%	94%	80%

Performance Measures Descriptions

Output/Outcome measures were changed from last year to align with key performance goals of the Workforce Equity Strategic Plan. Participant learning outcomes/outputs are intended to capture knowledge transfer and support of professional development which both align with the organizational commitment to becoming a learning organization.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$261,661	\$0	\$300,000	\$0
Total GF/non-GF	\$261,661	\$0	\$300,000	\$0
Program Total:	\$261,661		\$300,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by General Fund revenues.

Significant Program Changes

Last Year this program was: FY 2022: 72017B College to County Internship Expansion

Last year this was one time only funding under Program #72017B - College to County Interns.

Legal / Contractual Obligation

Multnomah County Code Chapter 11 (Preschool For All Personal Income Tax 11.500-560). The Personal Income Tax will be administered by the City of Portland through an intergovernmental agreement (IGA) that expires in fiscal year 2030.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$284,132	\$0	\$158,511
Contractual Services	\$0	\$0	\$0	\$15,000
Materials & Supplies	\$0	\$5,000	\$0	\$5,000
Internal Services	\$0	\$14,724	\$0	\$25,052
Total GF/non-GF	\$0	\$303,856	\$0	\$203,563
Program Total:	\$303,856		\$203,563	
Program FTE	0.00	2.00	0.00	1.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program generates \$5,691 in indirect revenues.

This program will be supported entirely by tax receipts from Preschool For All Program (fund 1522). Tax revenues budgeted in program offer 25200-23.

Significant Program Changes

Last Year this program was: FY 2022: 72008B FRM Preschool for All Tax Administration

Program has been reduced by 1.00 FTE (Finance Specialist Senior). One year into implementation of new tax program we have determined the program can be supported by one Project Manager and Tax Consultant (Professional Services).

Legal / Contractual Obligation

Multnomah County Code Chapter 11 (Preschool For All Personal Income Tax 11.500-560). The Personal Income Tax will be administered by the City of Portland through an intergovernmental agreement (IGA) that expires in fiscal year 2030.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$12,875,985	\$0	\$7,175,541
Total GF/non-GF	\$0	\$12,875,985	\$0	\$7,175,541
Program Total:	\$12,875,985		\$7,175,541	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program will be supported entirely by tax receipts from Preschool For All Program (fund 1522). Tax revenues budgeted in program offer 25200-23.

Significant Program Changes

Last Year this program was: [FY 2022: 72008B FRM Preschool for All Tax Administration](#)

Department: County Management **Program Contact:** Cessa Diaz
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs: 72022 Workday Support - Central Human Resources; 72046 Workday Support Finance
Program Characteristics: One-Time-Only Request

Executive Summary

Workday is part of the County's Enterprise Resource Planning system (ERP). Workday is designed to be managed and supported by business operational staff in Central Human Resources and Central Finance. These teams, the HR Workday Support team and Finance Support team, are responsible for developing, maintaining, troubleshooting, and enhancing Workday Human Capital Management (HCM) and Finance functionality in collaboration with County functional subject matter experts, ensuring an effective, efficient and innovative ERP system. If funded this project will address problematic configuration that has resulted in multiple complex and time intensive manual processes. This project will allow both HR Workday and Finance Support teams to identify key areas for optimization, efficiencies and system improvements.

Program Summary

This OTO program offer will fund the Workday Review and Recommend Project for one year. The County implemented Workday in January 2019 supported by two core teams, the HR Workday Support team and Finance Workday Support team. Over the last three years, it has been challenging to maintain efficient and effective functionality to support County operations. The County is a highly complex organization that requires sophisticated and advanced configuration, which is not currently implemented in our systems. We have continued to operate with problematic configuration that has been in place since initial implementation of Workday.

The Review and Recommend project will allow the HR Workday Support team and the Workday Finance team to implement new and improved configuration that will result in better system optimization, efficiency and accuracy. These enhancements have been established in partnership with Workday to ensure alignment with Workday best practices. It is expected that these critical updates and changes will have an immediate and noticeable impact resulting in reduced manual workarounds and work load impacts for key stakeholders.

Examples of targeted system enhancements or new configuration: redesign of time tracking calculations; updates to payroll retro processing; implementation of multiple jobs functionality; optimization of payroll mid-period staffing and or compensation changes; updates to salary reduction configuration.

Key deliverables of this project include: implementation of new configuration to improve functionality, accuracy, efficiencies, and user experience; analysis of identified configuration in Payroll, Absence and Time Tracking modules; development of configuration implementation project plan; extensive end to end testing for all new configuration; cross functional stakeholder engagement to ensure cohesive and accurate implementation across both HCM and Finance modules; improved and more accurate HR and payroll reporting; and change management for key stakeholders.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Prioritize key projects configured and implemented resulting in improved accuracy and efficiencies.	N/A	N/A	N/A	10
Outcome	Implement new reports and enhancements to reduce backlog and improve accuracy of HR/Payroll reporting.	N/A	N/A	N/A	95%
Outcome	Reduce manual processes related to payroll, time tracking and absence	N/A	N/A	N/A	50%

Performance Measures Descriptions

Output: We currently have over 70 system enhancements and configuration items, target goal of implementing a minimum of 10 configuration items, or 15% of the total list of enhancements. Outcome: Currently we have identified 16 complex reports that need to be developed or revised to get single sources of information. Target goal of implementing 15 reports, or 95% of report enhancements to improve overall reporting for Payroll, Time Tracking, and Absence. Outcome: Reduce current manual payroll cycle processes and audits by 5-6. for a 50% reduction.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$0	\$1,000,000	\$0
Total GF/non-GF	\$0	\$0	\$1,000,000	\$0
Program Total:	\$0		\$1,000,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by one-time-only General Fund revenues.

Significant Program Changes

Last Year this program was:

New one-time-only program offer

Department: County Management

Program Contact: Cessa Diaz

Program Offer Type: Innovative/New Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

Workday is part of the County's Enterprise Resource Planning system (ERP). Workday is designed to be managed and supported by business operational staff in Central Human Resources and Central Finance. If funded this project would support the development and implementation of HR data being added to the Finance Data Mart. The Data Mart has been identified as a key project for IT and Finance. Data Mart will allow for HR and Finance data in Workday to be extracted and used in external systems for comprehensive reporting not currently supported by Workday.

Program Summary

The Data Mart will include HR, Finance, and department stakeholders to develop an enterprise data mart environment, in order to enable departmental HR and Finance dashboards and reporting. Currently the County has a Finance Data Mart to capture financial data. This project will add HR data, increasing its functionality and usefulness. The Data Mart will pull Workday data into a business intelligence warehouse where it can be combined more easily with data from other sources (e.g. census data, EPIC, and other systems storing program outcome data) to provide new insights and help evaluate program success

Goals for the Data Mart include the following:

- Easier multi-year, countywide reporting could be of particular benefit to the Office of Diversity & Equity and the Evaluation and Research Unit
- Enables sharing of aggregated data while keeping individual data secured
- Fills some of Workday's reporting gaps (e.g. lack of effective dating for some key data, more granular control over data security)
- Improved data access, analytics, and reporting
- Extracted data can be used throughout the County to make key Finance and HR decisions
- Data will be highly secured and accessible by key partners for more comprehensive reporting
- Data Mart will provide access to HR data that can be utilized for analysis in additional platforms, including Tableau.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	HR Dashboards	N/A	N/A	N/A	10
Outcome	Reduced manual analysis due to a centralized HR data source	N/A	N/A	N/A	75%

Performance Measures Descriptions

Output: HR Dashboards are currently available to HR Workday users, HR Data mart will expand access to secure stakeholders for analysis and decision making. Outcome: Currently manual analysis is needed to evaluate HR Data against other relevant data sources, including financials. Implementation of the HR Data Mart should result in a reduction of manual processes.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$197,400	\$0
Materials & Supplies	\$0	\$0	\$17,600	\$0
Total GF/non-GF	\$0	\$0	\$215,000	\$0
Program Total:	\$0		\$215,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by one-time-only General Fund revenues.

Significant Program Changes

Last Year this program was:

This program offer seeks one-time-only funding for the Data Mart project.

Department: County Management

Program Contact: Serena Cruz

Program Offer Type: Innovative/New Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

In line with Multnomah County's social justice goals, the wages and benefits of Multnomah County employees are analyzed by a variety of stakeholders (including HR and the unions) for their regional competitiveness and fairness. However, many of the services Multnomah County delivers are provided by contracted third-party suppliers. In public contracting, a competitive bidding process is used to select service providers and project cost is among the competitive criteria. Therefore, nonprofit organizations and other suppliers may have incentive to suppress the wages of their employees in order to demonstrate a competitive project cost and win a contract. The program will fund a project to study, analyze, and provide recommendations to promote equitable compensation for employees of certain County-contracted suppliers.

Program Summary

The Contractor Capacity Review involves short- and long-term approaches to evaluate and create recommendations for contractor wage equity.

In the short-term, the County will conduct compensation evaluations of certain contracted services which will include a review of regional and local suppliers, particularly those with services relevant to County operations such as homeless services, human services, and health care services. The evaluations will help County policy-makers understand the market for specific job types and to determine the appropriate compensation to ensure our community based organizations can attract and retain employees to provide critical County services.

In the long-term, the County will support efforts by Oregon Solutions to take a more comprehensive look at how our community and state can address contractor compensation issues. The work may include a study of the status quo, including a review of compensation data from regional and local suppliers, an analysis of differences in supplier compensation and public sector compensation, research into other state or local government interventions, and a description of Oregon state public purchasing rules that may compel local governments to prioritize cost in competitive contracting. It is anticipated the study would assess whether differences in compensation are caused by competitive public contracting processes, determine whether low compensation by suppliers affects workforce recruitment, and describe a menu of possible interventions along with their risks and opportunities. Finally, the study is anticipated to recommend courses of action for state and local policy-makers.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Class compensation evaluations	N/A	N/A	N/A	20
Outcome	Progress toward an actionable set of recommendations for public policy makers to enhance compensation equity	N/A	N/A	N/A	1
Output	Hire one Human Resources limited-duration employee	N/A	N/A	N/A	1

Performance Measures Descriptions

The HR LDA will conduct class compensation evaluations described in the Program Summary to help County policy-makers understand the extent to which contracted workers are being compensated differently than the employment market; The longer-term study conducted by Oregon Solutions will take a broader look at the topic of contractor compensation and provide a list of possible interventions that will empower policy-makers to take action around contracted worker compensation. The work may or may not be complete in FY 23, but funding is critical to achieving longer-term solutions.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$175,000	\$0
Contractual Services	\$0	\$0	\$75,000	\$0
Total GF/non-GF	\$0	\$0	\$250,000	\$0
Program Total:	\$0		\$250,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by one-time-only General Fund revenue - \$250,000

Significant Program Changes

Last Year this program was:

This is a new, one-time-only FY 2023 program

Department: County Management **Program Contact:** Dorothy Elmore
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics:

Executive Summary

Using a trauma-informed, racial justice and equity lens, the Workplace Security Program provides a multi-disciplinary approach to safety and security, an approach that is beyond conventional enforcement and one that embraces collaboration and creativity with a range of stakeholders. The Program will plan, develop, and implement a security program that offers high-level subject matter expertise and is a central point of contact for security related matters across the County. The program will advise department leadership, the Chief Operating Officer, and elected officials.

Program Summary

The Workplace Security Program will increase general consistency, coherence, and subject matter expertise related to security matters. The program will create a stand-alone security function with relevant training and experience as well as security related decision making authority. This program will ensure more coordinated effort/different roles dispersed across the County, with Facilities, Risk Management and Departments with their own security programs. This program will help minimize duplication of efforts, encourage sharing of knowledge, and offer resources.

This program addresses equity by recognizing that our community is experiencing increased violence due to the socio-economic stressors of Covid-19 and the impact of years of systemic racism and social unrest. Our employees are experiencing increased exposure to individuals in crisis. Our buildings face regular defacement and damage. This program provides an opportunity to align policies and processes and create a unified County approach to security. The program consists of a Director who is responsible for program development, policy development, interagency relationships and two additional team members to assist with security-related training, patrols, threat management, incident response, and interagency operations.

Expected outcomes for this program include: Standardize policies and operating procedures for addressing security issues, trust of employees in management and addressing concerns. Employees know where to direct concerns and questions, holistic view of the threat landscape across the County, and clear lines of accountability and responsibility.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Develop standard policies and operating procedures for addressing security concerns	N/A	N/A	N/A	100%
Outcome	Provide communication, education and training through quarterly County and community engagement events	N/A	N/A	N/A	4

Performance Measures Descriptions

Development of standard policies and operating procedures for addressing security issues, trust of employees in management, and addressing concerns. Engage the County and community in quarterly events.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$0	\$0	\$637,200
Contractual Services	\$0	\$0	\$0	\$96,000
Materials & Supplies	\$0	\$0	\$0	\$16,800
Total GF/non-GF	\$0	\$0	\$0	\$750,000
Program Total:	\$0		\$750,000	
Program FTE	0.00	0.00	0.00	3.00

Program Revenues				
Other / Miscellaneous	\$0	\$0	\$0	\$750,000
Total Revenue	\$0	\$0	\$0	\$750,000

Explanation of Revenues

This program is funded through the Risk Fund.

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Travis Graves
Program Offer Type: Innovative/New Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

Reported cases of vandalism in east Multnomah County more than tripled between 2019 and 2021. Businesses have been targeted and impacted by vandalism, a source of economic loss on top of the significant challenges associated with the COVID-19 pandemic. Whereas the city of Portland has a “repair grant” program to cover vandalism costs for businesses within the city, east county has no such program. This program will help support small businesses by covering the cost of vandalism up to \$5,000.

Program Summary

This program will provide grants to small businesses in east county (east of the city of Portland) that can document vandalism and the associated costs. The program will provide support of up to \$5,000 to local small businesses needing immediate repairs. Grants are available to businesses that have sustained physical damage – such as broken windows or doors, graffiti, or sign damage.

Modeled on the city of Portland’s “repair grant,” businesses will be required to provide their state business license number, proof of ongoing operations, as well as the physical location of the business damaged. Grants will be capped at costs or \$5,000, whichever is less. Administrative costs will not exceed 10% of funding. Documents associated with any decision will need to be maintained for record keeping and audit purposes. Businesses must be registered with the State Business Registry. Inventory replacement and business operating costs related to repairs are not eligible for grant reimbursement.

The County will partner with east county and/or small business associations to inform small business owners of the fund, and host the webpage describing the program and linking to the documentation and resources needed to apply for assistance. The program will be administered by a third party partner.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of grants distributed to small businesses in east county	N/A	N/A	N/A	15
Outcome	Percentage of grant recipients that are BIPOC-owned Businesses	N/A	N/A	N/A	30%
Outcome	Identify and inform small businesses of the new Business Repair Fund Program	N/A	N/A	N/A	1

Performance Measures Descriptions

The fund is anticipated to distribute 15 or more grants this fiscal year, with a goal of at least 30% of recipients will be BIPOC-owned businesses. Outcome measure #3 goal is to identify small businesses who previously received Cares Act Business Relief Funding, and inform them of the new Business Repair Fund availability. 1=achieved; 0=not achieved

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Contractual Services	\$0	\$0	\$110,000	\$0
Total GF/non-GF	\$0	\$0	\$110,000	\$0
Program Total:	\$0		\$110,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Total Revenue	\$0	\$0	\$0	\$0

Explanation of Revenues

This program is supported by one-time-only General Fund revenues

Significant Program Changes

Last Year this program was:

Department: County Management **Program Contact:** Eric Arellano
Program Offer Type: Existing Operating Program **Program Offer Stage:** As Adopted
Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

This program is responsible for maintaining federal grant compliance with American Rescue Plan (ARP) Act laws and regulations. The dedicated position will track County ARP spend, usage of funding, complete all federal required reporting, support general compliance to laws and regulations, support County departments with ARP fund usage, and support enhanced external audit activities as it relates to COVID-19 relief funding.

Program Summary

As a result of the COVID-19 pandemic the federal government has enacted three separate relief bills that have provided local governments with direct financial support in addition to many other priorities (e.g. CARES Act, COVID Relief, & ARPA). The federal relief supports local governments in responding to the pandemic (e.g. testing, contact tracing, vaccination, business relief, rent assistance, food assistance, COVID-19 supplies, efforts to comply with CDC safety requirements, etc..). The new funding comes with various federal spending, reporting, and compliance requirements that require strong and effective oversight. All federal funding received (direct or pass-through) is subject to the Office of Management and Budget (OMB) Super Circular requirements.

ARPA funds will support urgent COVID-19 response efforts to continue to decrease spread of the COVID virus, support immediate economic stabilization for households and businesses, and address systemic public health and economic challenges that have contributed to the unequal impact of the pandemic on certain populations.

This program will provide for a limited duration position (Senior Finance Specialist) to track all County ARP relief funding, maintain oversight on usage/spend, complete required federal reporting, provide guidance/education to applicable department staff, support efforts on an enhanced Single Audit process, and support overall County compliance efforts.

- Comply with ARP Final Rules and FAQ
- Complete quarterly and annual reporting for ARP (e.g. projects, expenditures, and recovery plan)
- Monitor spend for allowability
- Provide ARP federal compliance training
- Support external audit processes for ARP (e.g. Single Audit)
- Support subrecipient monitoring efforts

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of Single Audit deficiency comments from external auditor (ARPA Funding)	N/A	N/A	0	0
Outcome		N/A	N/A	N/A	N/A

Performance Measures Descriptions

External auditors express their opinion on the County's Single Audit Report (Audit of Federal Expenditures). A zero result means the auditors identified no deficiencies or weaknesses in internal controls.

Legal / Contractual Obligation

American Rescue Plan (ARP) Act Rules

The OMB Federal Register requires entities expending Federal funds over \$750,000 in a fiscal year to have a single audit of Federal awards. Also, according to the Federal Register, Federal funds that are passed on to other organizations (such as non-profits) must perform subrecipient monitoring on those contracts funded with pass-through dollars.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$160,000	\$0	\$160,000
Total GF/non-GF	\$0	\$160,000	\$0	\$160,000
Program Total:	\$160,000		\$160,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Intergovernmental	\$0	\$160,000	\$0	\$160,000
Total Revenue	\$0	\$160,000	\$0	\$160,000

Explanation of Revenues

American Rescue Plan (ARP) Act Direct County Funding - \$160,000

Significant Program Changes

Last Year this program was: FY 2022: 72900 ARP - Federal Grant Compliance and Monitoring

This program aligns with priority area 5 - Critical County Infrastructure - Maintaining federal compliance, transparency, and accountability to the residents of Multnomah County is a top priority.

Department: County Management

Program Contact: Shelly Kent

Program Offer Type: Innovative/New Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics: One-Time-Only Request

Executive Summary

The Multnomah County Future of Work initiative is a collection of projects that support the following changes in the workplace including: revisions to workplace policies and practices, changes in facilities and workspace management, training and support resources, and maintaining our commitment to regular county wide communications. The Future of Work Coordinator provides leadership and project management for countywide planning for return to onsite work transition, as well as rules and processes that support a telework staffing environment. In addition, this program includes resources to develop and implement plans to reconfigure county facilities in response to updated programmatic needs due to the large number of routine, hybrid and ad hoc teleworking employees.

Program Summary

This program funds a Future of Work Coordinator (HR Manager 1, limited duration) to serve as a project manager for countywide planning for return to onsite work transition, as well as development of rules and processes that support a telework staffing environment.

County leadership and key stakeholders developed guiding principles to help shape the Future of Work at Multnomah County, including a shared commitment to prioritizing community and customer needs; establishing effective remote and onsite strategies that match our services, employees and workgroup needs; and advancing equitable practices that ensure all employees, whether working remotely or onsite, are supported with opportunities to grow and thrive. In partnership with work initiated in the DCA to evaluate future space needs, this may include creating department and countywide hoteling or shared work spaces and the reconfiguration of current program footprints to right size based on an evaluation of future needs.

Program activities include bringing stakeholders together to develop plans and reach agreements, assisting with supervisor and employee communications, updating policy and process documents as needed, collaborating with Human Resources, Facilities, supervisors and managers on strategies to bring employees back onsite, supporting employee and supervisor training efforts, serving as a liaison between Central Human Resources, Facilities and Risk Management on safe workspaces and providing resources to fund space reconfiguration implementation.

The use of these resources will be evaluated and approved by the Chief Operating Officer (COO) in partnership with the Department of County Assets (DCA) Facilities Division and based on countywide departmental needs.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of pilot space redesign projects implemented	N/A	N/A	N/A	5
Outcome	Percentage of department managers who have the resources and tools needed to make informed decisions	N/A	100%	100%	100%
Output	Number of employees in a telework arrangement of some kind	N/A	N/A	2,800	3,100
Output	Number of communications on Future of Work (weekly Monday Minute, Multco Matters, Management Monthly)	N/A	N/A	152	152

Performance Measures Descriptions

Output and Outcome: The work of this program will impact the majority of employees either through ensuring that safety protocols are in place for employees returning to work onsite and/or through employees having some form of telework schedule and/or reconfiguration of employee spaces. One goal of the program is to ensure decisions are made consistently across the county. Space redesign projects implemented estimated pending input from departments, DCA and consultant.

Legal / Contractual Obligation

American Rescue Plan (ARP) Act Rules.

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Health Insurance Portability & Accountability Act and other employment related issues including twelve labor agreements.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$191,604	\$0	\$197,557
Contractual Services	\$0	\$0	\$0	\$750,000
Materials & Supplies	\$0	\$8,396	\$0	\$1,757,443
Total GF/non-GF	\$0	\$200,000	\$0	\$2,705,000
Program Total:	\$200,000		\$2,705,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Intergovernmental	\$0	\$200,000	\$0	\$2,705,000
Total Revenue	\$0	\$200,000	\$0	\$2,705,000

Explanation of Revenues

American Rescue Plan (ARP) Direct County Funding, One time Only - \$2,705,000
Future of Work Coordinator \$205,000
Future of Work Space Planning \$2,500,000

Significant Program Changes

Last Year this program was: FY 2022: 72901 ARP - Future of Work Coordinator

This is a program under priority area 5 - Critical County Infrastructure. The position is an investment in the county's leadership team to support employees returning to work onsite safely and to develop rules and processes for telework schedules. The resources for space reconfiguration will allow funding to make the best use of county facilities into the future.

Department: County Management

Program Contact: Shelly Kent

Program Offer Type: Existing Operating Program

Program Offer Stage: As Adopted

Related Programs:
Program Characteristics:

Executive Summary

Labor Relations provides leadership to ensure effective labor-management relationships, appropriate work conditions and legal compliance that balance the rights of employees with the business needs of the County. This program manages 12 labor contracts, representing 85% of the County workforce, and the Personnel Rules (work rules) that apply to 100% of County employees. This program provides funding for expansion of Labor Relations services and support.

Program Summary

Program funds a Labor Relations Human Resources Manager 2 position (limited duration) to support the expansion of existing services, provide general Labor Relations support; and create additional capacity needed to bargain contracts which were rolled over due to COVID-19.

Performance Measures

Measure Type	Primary Measure	FY21 Actual	FY22 Budgeted	FY22 Estimate	FY23 Offer
Output	Number of Covid-19 related Labor Disputes	26	22	58	35
Outcome	Percentage of Covid-19 related labor disputes settled collaboratively	100%	96%	98%	98%

Performance Measures Descriptions

Output and Outcome: Disputes include formal and informal disagreements about the interpretation or application of labor contracts, Personnel Rules, practices or policies. Resolving labor disputes collaboratively means all involved parties have agreed to the resolution without going to arbitration. Arbitration can be costly and result in a binding decision that is not in the county's best interest.

Legal / Contractual Obligation

Federal, state, local laws, rules, and regulations covering wage and hour, discrimination, harassment, labor relations, privacy, employment at will, hiring, defamation, Uniformed Service Employment and Re-employment Rights Act, Health Insurance Portability & Accountability Act and other employment related issues. Twelve labor agreements necessitate contract compliance regarding rates of pay, hours of work, fringe benefits and other matters pertaining to employment.

American Rescue Plan (ARP) Act Rules.

Revenue/Expense Detail

	Adopted General Fund	Adopted Other Funds	Adopted General Fund	Adopted Other Funds
Program Expenses	2022	2022	2023	2023
Personnel	\$0	\$218,531	\$0	\$230,788
Materials & Supplies	\$0	\$8,069	\$0	\$4,212
Total GF/non-GF	\$0	\$226,600	\$0	\$235,000
Program Total:	\$226,600		\$235,000	
Program FTE	0.00	0.00	0.00	0.00

Program Revenues				
Intergovernmental	\$0	\$226,600	\$0	\$235,000
Total Revenue	\$0	\$226,600	\$0	\$235,000

Explanation of Revenues

American Rescue Plan (ARP) Direct County Funding - \$226,600

Significant Program Changes

Last Year this program was: FY 2022: 72902 ARP - Labor Relations Expanded Support

This is a program under priority area 5 - Critical County Infrastructure. The position is to assist Central Human Resources with addressing current and anticipated labor relations issues, which have countywide impacts.