

Form 1
Grant Application Staffing
2016-2017

Yamhill County	Approved FTE Current Year (2015-2016)	Budgeted FTE Coming Year (2016-2017)	Change (Column 2 less Column 1)
A. Assessment Administration			
Assessor, Deputy, etc.	2.05	2.00	-0.05
Assmt. Support Staff, Deed Clerks, & Data Entry Staff	2.00	2.00	0.00
Total Assessment Administration	4.05	4.00	-0.05
B. Valuation-Appraisal Staff			
Chief Appraisers/Appraiser Supervisor	1.00	1.00	0.00
Lead Appraisers	0.00	0.00	0.00
Residential Appraisers	2.00	2.00	0.00
Commercial/Industrial Appraisers	2.00	2.00	0.00
Farm/Forest/Rural Appraisers	3.00	3.00	0.00
Manufactured Structure/Floating Structure Appraisers	0.00	0.00	0.00
Personal Property Appraisers	0.00	1.00	1.00
Personal Property Clerks	2.00	1.00	-1.00
Sales Data Analyst	1.00	1.00	0.00
Data Gatherers & Appraisal Techs	0.00	0.00	0.00
Total Valuation-Appraisal Staff	11.00	11.00	0.00
C. Clerk/BOPTA Staff	0.05	0.06	0.01
D. Tax Collection & Distribution Administration			
Administration, Deputy, etc.	1.45	2.00	0.55
Support & Collection Staff	1.50	1.00	-0.50
Tax Distribution	0.00	0.25	0.25
Foreclosure & Garnishment	0.00	0.25	0.25
Total Tax Collection & Distribution Staff	2.95	3.50	0.55
E. Cartography & GIS Administration			
Cartographic/GIS Supervisor	0.00	0.00	0.00
Lead Cartographer	1.00	1.00	0.00
Cartographers	0.00	0.00	0.00
GIS Specialist	0.00	0.00	0.00
Total Cartographic & GIS Staff	1.00	1.00	0.00
F. A&T Data Processing Staff	2.10	1.91	-0.19
G. Total A&T Staffing (the sum of A-F above)	21.15	21.47	0.32

B.O. 11e-133

Form 2
Explanation of Staffing Issues
2016-2017

Yamhill County

In this section, explain any difference between approved staffing for the current year and staffing for the budgeted year. Explain why any funded positions were unfilled for the current year. Use this form to describe the intended use of nonpermanent workers (temporary help, project temporaries, and contractors) by A&T function, along with their cost. Note any special or unique aspects regarding who accomplishes the work and how they accomplish it related to Forms 4, 5, and 6. For example, if you use staff to perform personal property functions, other than reported on Form 1, Section B, note that here and include the FTE. ... Show More

The Assessor's Office has seen an increased work load over the past two years due to notable employee attrition. For the County as an employer, the job market has seen significant constraint over the last three years. Economic recovery has led to pre- recession unemployment rates around 5%. High demand for Appraisers in the private sector and competing with Portland Metro counties for public sector Appraisers has made recruitment for appraiser positions extremely difficult. Additionally, training new Assessment Specialist for the Tax Department can take as long as 3 years. This makes loosing employees that much more difficult. The budget for this year includes additional funds for temporary assistance for both the Appraisal and Assessment staff while we continue to recruit replacement personnel.

**Form 3
General Comments
2016-2017**

Yamhill County

Use this form to describe any issue in your budget that needs further clarification. Examples would be significant changes on Form 7, purchase of a new data processing system, salary increases, new car purchases, personal services costs for mapping, etc. You may also use this form to document any miscellaneous comments. ... [Show More](#)

Over the past four years the Assessor's office has been in the process of procuring and converting to new assessment and tax software. Our office is finalizing the data validation and user acceptance testing phases of the project. The new software has features and functionality that will immediately assist with efficiency and accuracy of the daily operations for the office. The software go-live date is currently estimated for July 30th 2016.

The 2016-2017 budget includes expense allocation for annual software maintenance and support. Yamhill county anticipates also joining the Ascend / ProVal Executive Steering Committee. The additional support will mitigate statutory compliance risk as well as give our administrative users a better understanding of the deployment and advance utilization of the software. After a couple of annual appraisal and tax cycles, we will no longer need or warrant the additional assistance from the Ascend/ProVal Executive Steering Committee.

Form 4
Valuation—Appraisal Resources
2016-2017

Yamhill County

Activities	Number of Accounts by Activity		Number of FTE by Activity	
	Actual (2015-2016)	Estimated (2016-2017)	Actual (2015-2016)	Estimated (2016-2017)
1. Real Property Exceptions, Special Assessments, and Exemptions				
New Construction	2704	2974	3.25	3.25
Zone Changes	2	5	0.03	0.03
Subdivisions, Segregations, Consolidations	344	378	0.40	0.40
Omitted Properties	6	5	0.02	0.02
Special Assessment Qualification and Disqualification	129	140	0.70	0.70
Exemptions	69	85	0.10	0.10
Subtotal	3254	3587	4.50	4.50
2. Appeals and Assessor Review				
Assessor Review and Stipulations	101	100	0.25	0.25
BOPTA	79	80	0.25	0.25
Department of Revenue	2	5	0.00	0.00
Magistrate Division—Tax Court	5	15	0.25	0.25
Regular Division—Tax Court	21	5	0.25	0.25
Subtotal	208	205	1.00	1.00
3. Real Property Valuation				
Physical Reappraisal	1850	2000	2.00	2.00
Recalculation only—no appraisal review	0	0	0.00	0.00
Subtotal	1850	2000	2.00	2.00
4. Business Personal Property (returns mailed)				
	2918	3006	2.00	2.00
5. Ratio				
			1.00	1.00
6. Continuing Education				
			0.50	0.50
7. Other Valuation—Appraisal Activity				
			0.00	0.00
8. Total Valuation—Appraisal Staff (FTE)				
			11.00	11.00

Form 5
Tax Collection/Distribution
Work Activity
2016-2017

Yamhill County	Number of Accounts by Activity	
	Actual (2015-2016)	Estimated (2016-2017)
1. Number of accounts requiring roll corrections		
Business Personal Property	32	40
Personal Property Manufactured Structures	11	20
Real Property	13	140
2. Number of accounts requiring a refund		
Business Personal Property	22	20
Personal Property Manufactured Structures	19	30
Real Property	200	200
3. Number of delinquent tax notices sent		
Business Personal Property	180	190
Personal Property Manufactured Structures	692	700
Real Property	5644	2400
4. Number of foreclosure accounts processed		
Real Property only	36	50
5. Number of accounts issued redemption notices		
Real Property only	18	25
6. Number of warrants	317	325
7. Number of garnishments	0	0
8. Number of seizures	0	0
9. Number of bankruptcies	110	100
10. Number of accounts with an address change processed	1275	1300
11. How many second trimester statements do you mail?	0	
12. How many third trimester statements do you mail?	0	
13. Does the county contract for lock box service?	Yes	
14. Does the county use in-house remittance processing?	No	
15. Is the tax collector combined with another county function?	Yes	

If tax collector is combined with another county function, please describe that function.

In Yamhill County the Assessor and the Tax Collector are combined into one position.

**Form 6
Assessment and Administrative
Support and Cartography
Work Activity
2016-2017**

Yamhill County

**Assessment and Administrative Support
Work Activity**

	Numbers by Activity	
	Actual (2015-2016)	Estimated (2016-2017)
1. Number of Deeds Worked	<u>4450</u>	<u>5100</u>

Cartography Work Activity

	Numbers by Activity	
	Actual (2015-2016)	Estimated (2016-2017)
1. Number of new tax lots	<u>165</u>	<u>79</u>
2. Number of lot line adjustments	<u>56</u>	<u>31</u>
3. Number of consolidations	<u>10</u>	<u>9</u>
4. Number of new maps	<u>0</u>	<u>0</u>
5. Number of tax code boundary changes	<u>3</u>	<u>2</u>

**Form 7
Summary of Expenses
2016-2017**

Yamhill County

Current operating expenses	A. Assessment Administration	B. Valuation	C. BOPTA	D. Tax Collection & Distribution	E. Cartography*	F. A&T Data Processing	TOTALS
1. Personal Services	\$354,551	\$950,788	\$5,186	\$298,607	\$92,337	\$194,378	\$1,895,847
2. Materials & Services	\$90,745	\$151,504	\$5,224	\$155,751	\$19,524	\$6,723	\$429,471
3. Transportation	\$0	\$7,500	\$125	\$0	\$0	\$0	\$7,625
4. Total Current Operating Expenses (Total Direct Expenses)	\$445,296	\$1,109,792	\$10,535	\$454,358	\$111,861	\$201,101	\$2,332,943

* Include ORMAP-approved grant funding

Indirect Expenses

5. Total Direct Expenses (line 4)	\$2,332,943
6. If you use the 5 percent method to calculate your indirect expenses, enter .05 in this box. Total Indirect Expenses (line 5 x line 6).	0.05 \$116,647
6A. If you use a percent amount approved by a federal granting agency to calculate your indirect expenses, enter that percentage in this box Total Indirect Expenses (line 6A x the direct expense amount for the category/categories that your certificate allows)	0.00 \$0
7. Total Indirect Expenses	\$116,647

Capital Outlay

	Assessment Administration	Valuation	BOPTA	Tax Collection & Distribution	Cartography*	A&T Data Processing	Total Capital Outlay Without Regard to Limitation
8. Enter the actual capital outlay without regard to limitation.	\$0	\$0	\$0	\$0	\$0	\$0	\$0

- 9. Total direct and indirect expenses (line 4 + line 7) **\$2,449,590**
- 10. Direct and indirect expenses x 0.06 **\$146,975**
- 11. The greater of line 10 or \$50,000 **\$146,975**
- 12. Capital outlay (the lesser of line 8 or line 11) **\$0**
- 13. Total expenditures for CAFFA consideration (line 4 + line 7 + line 12) **\$2,449,590**

Form 8 Grant Application Resolution 2016-2017

Yamhill County is applying to the Department of Revenue in order to participate in the Assessment and Taxation grant.

This state grant provides funding for counties to help them come into compliance or remain in compliance with ORS 308.232, 308.234, Chapters 309, 310, 311, 312, and other laws requiring equity and uniformity in the system of property taxation.

Yamhill County has undertaken a self-assessment of its compliance with the laws and rules that govern the Oregon property tax system. County is generally in compliance with ORS 308.232, 308.234, Chapters 309, 310, 311, 312, and other laws requiring equity and uniformity in the system of property taxation.

Yamhill County agrees to appropriate the budgeted dollars based on 100 percent of the expenditures certified in the grant application in the amount of \$2,449,590.00, the total expenditure amount for consideration in the grant. If 100 percent is not appropriated, no grant shall be made to the county for the quarter in which the county is out of compliance.

County designates:

Laura Tschabold

Name

(503) 434-7501 ext.4521

Telephone

tschabold@co.yamhill.or.us

E-mail Address

as the county contact person for this grant application.

County Approval

By selecting the "I Accept" checkbox, you are signing this Resolution electronically and certifying the Resolution has been approved by the county board. You agree your electronic signature is the legal equivalent of your manual signature.

I Accept

Mary Starrett

Signature (Chair/Judge or Appointee)

Chair, Commissioner

Title

4/14/16

Date

Accepted by Yamhill County
Board of Commissioners on
4.14.16 by Board Order
16-133

Form 9 Racial and Ethnic Impact Statement

**This form is used for informational purposes only and must be included with the grant application
2016-2017**

Yamhill County

Chapter 600 of the 2013 Oregon Laws require applicants to include with each grant application a racial and ethnic impact statement. The statement provides information as to the disproportionate or unique impact the proposed policies or programs may have on minority persons ¹ in the State of Oregon if the grant is awarded to a corporation or other legal entity other than natural persons.

1. The proposed grant project policies or programs could have a disproportionate or unique positive impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

2. The proposed grant project policies or programs could have a disproportionate or unique negative impact on the following minority persons:

Indicate all that apply:

- Women
- Persons with Disabilities
- African-Americans
- Hispanics
- Asians or Pacific Islanders
- American Indians
- Alaskan Natives

3. The proposed grant project policies or programs will have no disproportionate or unique impact on minority persons.

If you checked numbers 1 or 2 above, on a separate sheet of paper, provide the rationale for the existence of policies or programs having a disproportionate or unique impact on minority persons in this state. Further provide evidence of consultation with representative(s) of the affected minority persons.

I HEREBY CERTIFY on this 4th day of April, 2016, the information contained on this form and any attachment is complete and accurate to the best of my knowledge.

Scott Maytubby

¹ "Minority persons" are defined in SB 463 (2013 Regular Session) as women, persons with disabilities (as defined in ORS 174.107), African-Americans, Hispanics, Asians or Pacific Islanders, American Indians and Alaskan Natives.

CAFFA 2016-17 Department Totals

County Council				
FTE Estimates	Hrs	Rate	Cost	FTE %
County Council	225	85	19,125.00	12.26%
Deputy County	100	58	5,800.00	4.81%
Paralegal	40	48	1,920.00	0.48%
Total County Council	365		26,845.00	0.18

County Clerk				
FTE Estimates	Hrs	Rate	Cost	FTE %
Clerk	56	\$43.79	2,452.00	0.03
Chief Deputy	12	\$38.42	461.00	0.01
Office Specialist TE	64	\$28.42	1,819.00	0.03
Total FTE Estimates	132		4,732.00	0.06

Other Costs				
	Hrs		Cost	
Overtime	1.76		50.00	
Central Supplies			100.00	
Publications and Dues			200.00	
Dept. Equipment			250.00	
Contract Services			50.00	
Training & Development			250.00	
BOPTA			1,000.00	
Telephone			0.00	
Postage			250.00	
Travel Expense			125.00	
Building Rent			225.00	
Equipment Rent			25.00	
Heat/light/water			10.00	
Equipment Maintenance			360.00	
Misc. Repair			100.00	
SW LIC/SUP-Application			1,836.00	
Building Reserve			524.00	
Internal Telecommunication			200.00	
Equipment Replacement			224.00	
Telecomm per call an			25.00	
Total Other Costs			5,804.00	
Total County Clerk			10,536.00	

Information Technology				
FTE Estimates	Hrs	Rate	Cost	FTE %
Diane VanDyke	145.67	\$40.14	\$5,847.19	0.07
Anne Britt	145.67	\$22.72	\$3,309.62	0.07
Travis	104	\$41.27	\$4,292.08	0.05
John	104	\$49.87	\$5,186.48	0.05
Adam Green	104	\$41.45	\$4,310.80	0.05
Shane	145.67	\$51.91	\$7,561.73	0.07
Todd Pettijohn	1664	\$48.38	\$80,504.32	0.80
Jill Olson	1560	\$53.44	\$83,366.40	0.75
Total FTE Estimates	3973.01		194,378.63	1.91

Materials and Services				
			Cost	
Unysis			\$6,152.34	
FTP	815	70	\$570.50	
Total Materials and Services			\$6,722.84	
Total IT			\$201,101.47	

Financial Management				
FTE Estimates	Hrs	Rate	Cost	FTE %
Crystal Wooldridge	38.00	\$46.35	\$1,761.45	0.02
Laurie Murphy	72.50	\$30.72	\$2,227.42	0.03
Becky Weaver	19.00	\$58.23	\$1,106.44	0.01
Norma Heath	107.75	\$30.72	\$3,310.40	0.05
Total FTE Estimate	237.25		\$8,405.71	0.11

Materials and Services				
Deposit Slips, checks			500.00	
Total Financial Management			8,905.71	

Department Totals		
Department	Costs	FTE Estimate
County Council	\$26,845.00	0.18
County Clerk	\$10,536.00	0.06
Information Technology	\$201,101.47	1.91
Financial Management	\$8,905.71	0.11
Totals	\$247,388.18	2.26

Grant Percentages		
Department	Costs	
County Council	\$26,845.00	
County Clerk	\$10,536.00	
Information Technology	\$201,101.47	
Financial Management	\$8,905.71	
Treasurer	\$0.00	
Totals	\$247,388.18	