

**OREGON REAL ESTATE AGENCY  
2015-17 GOVERNOR’S BALANCED BUDGET**

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# CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the arithmetic accuracy of all numerical information has been verified.

Oregon Real Estate Agency

1177 Center Street NE Salem, Oregon 97301

**AGENCY NAME**

**AGENCY ADDRESS**

**SIGNATURE**

Real Estate Commissioner

**TITLE**

Notice: Requests of those agencies headed by a board or commission must be approved by those bodies of official action and signed by the board or commission chairperson. The requests of other agencies must be approved and signed by the agency director or administrator.

Agency Request

Governor's Balanced

Legislatively Adopted

Budget Page \_\_\_\_\_

# BUDGET NARRATIVE

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77<sup>th</sup> OREGON LEGISLATIVE ASSEMBLY – 2013 Session  
BUDGET REPORT AND MEASURE SUMMARY

MEASURE: HB 5045

JOINT COMMITTEE ON WAYS AND MEANS

Carrier – House: Rep. McKeown  
Carrier – Senate: Sen. Shields

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Action: Do Pass

Vote: 23 – 0 – 3

House

Yeas: Barker, Buckley, Frederick, Huffman, Jenson, Komp, McLane, Nathanson, Read, Richardson, Smith, Tomei, Williamson

Nays:

Exc: Freeman, Hanna

Senate

Yeas: Bates, Devlin, Edwards, Girod, Hansell, Monroe, Steiner Hayward, Thomsen, Whitsett, Winters

Nays:

Exc: Johnson

Prepared By: Dustin Ball, Department of Administrative Services

Reviewed By: Kim To, Legislative Fiscal Office

Meeting Date: May 10, 2013

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Agency

Oregon Real Estate Agency

Biennium

2013-15

# BUDGET NARRATIVE

## Budget Summary\*

|             | 2011-13 Legislatively<br>Approved Budget <sup>(1)</sup> | 2013-15 Current<br>Service Level | 2013-15 Committee<br>Recommendation | Committee Change from<br>2011-13 Leg. Approved |          |
|-------------|---|----------------------------------|-------------------------------------|--|----------|
|             |   |                                  |                                     | \$ Change                                      | % Change |
| Other Funds | \$ 7,461,430  | \$ 7,276,950                     | \$ 7,121,715                        | (339,715)                                      | -4.6     |
| Total       | \$ 7,461,430  | \$ 7,276,950                     | \$ 7,121,715                        | (339,715)                                      | -4.6     |

## Position Summary

|                                      |       |       |       |       |
|--------------------------------------|-------|-------|-------|-------|
| Authorized Positions                 | 30    | 30    | 30    | 00    |
| Full-time Equivalent (FTE) positions | 30.00 | 30.00 | 30.00 | 00.00 |

(1) Includes adjustments through December 2012.

\* Excludes Capital Construction expenditures

## Summary of Revenue Changes

The Oregon Real Estate Agency is funded entirely with fees paid for professional licenses, by brokers, principal brokers and property managers. Other revenue includes registration, auditing and publication fees. The Committee's recommended budget will leave a projected ending balance of approximately \$0.9 million, or three months of operating expenses.

## Summary of Transportation and Economic Development Subcommittee Action

The Subcommittee approved a budget of \$7,121,715 Other Funds and 30.00 full-time equivalent positions for 2013-15, which is a 4.6 percent decrease from the 2011-13 legislatively approved spending level.

The Subcommittee approved the following recommendations:

- Package 091, Statewide Administrative Savings, eliminates \$36,058 Other Funds expenditure limitation. This package is a placeholder for administrative efficiencies in finance, information technology, human resources, accounting, payroll, and procurement expenditures. The Department of Administrative Services will continue to work on details of these reductions with agencies and report back during the 2014 session.

# BUDGET NARRATIVE

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- Package 092, PERS Tax Policy, eliminates \$13,242 Other Funds expenditure limitation. This package reflects the policy change in SB 822 that eliminates the increased retirement benefits resulting from Oregon income taxation of payments if the person receiving payments does not pay Oregon income tax on those benefits and is not an Oregon resident. This change reduces state employer contribution rates by approximately 0.30 percent.
- Package 093, Other PERS Adjustments, eliminates \$105,935 Other Funds expenditure limitation. This package reflects the policy change in SB 822 that modifies the cost-of-living adjustment under the Public Employees Retirement System. This change reduces state employer contribution rates by approximately 2.2 percent.

An administrative action by the PERS Board, as directed by a budget note in the SB 822 budget report, will reduce state employer contribution rates by up to an additional 1.9 percent. However, no employer rate is reduced below its 2011-13 biennium rate.

## Summary of Performance Measure Action

See attached Legislatively Adopted 2013-15 Key Performance Measures form.

# BUDGET NARRATIVE

## DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 5045

Oregon Real Estate Agency  
Dustin Ball – 503-378-3119

| DESCRIPTION  | GENERAL FUND   | LOTTERY FUNDS | OTHER FUNDS         |             | FEDERAL FUNDS |             | TOTAL ALL FUNDS  | POS       | FTE          |
|--|----------------|---------------|---------------------|-------------|---------------|-------------|------------------|-----------|--------------|
|  |                |               | LIMITED             | NONLIMITED  | LIMITED       | NONLIMITED  |                  |           |              |
| 2011-13 Legislatively Approved Budget at Dec 2012 * \$ | 0 \$           | 0 \$          | 7,461,430 \$        | 0 \$        | 0 \$          | 0 \$        | 7,461,430        | 30        | 30.00        |
| 2013-15 ORBITS printed Current Service Level (CSL)*\$  | 0 \$           | 0 \$          | 7,276,950 \$        | 0 \$        | 0 \$          | 0 \$        | 7,276,950        | 30        | 30.00        |
| <b>SUBCOMMITTEE ADJUSTMENTS (from CSL)</b>             |                |               |                     |             |               |             |                  |           |              |
| <b>SCR 050 - Real Estate Agency</b>                    |                |               |                     |             |               |             |                  |           |              |
| Package 091: Statewide Administrative Savings          |                |               |                     |             |               |             |                  |           |              |
| Personal Services                                      | \$ 0 \$        | 0 \$          | (25,920) \$         | 0 \$        | 0 \$          | 0 \$        | (25,920)         | 0         | 0.00         |
| Services and Supplies (Instate Travel)                 | \$ 0 \$        | 0 \$          | (10,138) \$         | 0 \$        | 0 \$          | 0 \$        | (10,138)         | 0         | 0.00         |
| <b>SCR 050 - Real Estate Agency</b>                    |                |               |                     |             |               |             |                  |           |              |
| Package 092: PERS Taxation Policy                      |                |               |                     |             |               |             |                  |           |              |
| Personal Services                                      | \$ 0 \$        | 0 \$          | (13,242) \$         | 0 \$        | 0 \$          | 0 \$        | (13,242)         | 0         | 0.00         |
| <b>SCR 050 - Real Estate Agency</b>                    |                |               |                     |             |               |             |                  |           |              |
| Package 093: Other PERS Adjustments                    |                |               |                     |             |               |             |                  |           |              |
| Personal Services                                      | \$ 0 \$        | 0 \$          | (105,935) \$        | 0 \$        | 0 \$          | 0 \$        | (105,935)        | 0         | 0.00         |
| <b>TOTAL ADJUSTMENTS</b>                               | <b>\$ 0 \$</b> | <b>0 \$</b>   | <b>(155,235) \$</b> | <b>0 \$</b> | <b>0 \$</b>   | <b>0 \$</b> | <b>(155,235)</b> | <b>0</b>  | <b>0.00</b>  |
| <b>SUBCOMMITTEE RECOMMENDATION *</b>                   | <b>\$ 0 \$</b> | <b>0 \$</b>   | <b>7,121,715 \$</b> | <b>0 \$</b> | <b>0 \$</b>   | <b>0 \$</b> | <b>7,121,715</b> | <b>30</b> | <b>30.00</b> |
| % Change from 2011-13 Leg Approved Budget              | 0.0%           | 0.0%          | -4.6%               | 0.0%        | 0.0%          | 0.0%        | -4.6%            | 0.0%      | 0.0%         |
| % Change from 2013-15 Current Service Level            | 0.0%           | 0.0%          | -2.1%               | 0.0%        | 0.0%          | 0.0%        | -2.1%            | 0.0%      | 0.0%         |

HB 5045  
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# BUDGET NARRATIVE

## Legislatively Approved 2013-2015 Key Performance Measures

**Agency:** REAL ESTATE AGENCY

**Mission:** To provide quality protection for Oregon consumers of real estate, escrow and land development services, balanced with a professional environment conducive to a healthy real estate market.

| Legislatively Proposed KPMs  | Customer Service Category   | Agency Request | Most Current Result | Target 2014 | Target 2015 |
|--|-----------------------------|----------------|---------------------|-------------|-------------|
| 1 - Compliance Rate Achieved - Percent of property managers/principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review.  |                             | Approved KPM   |                     | 90.00       | 90.00       |
| 2 - Percent of investigations completed within 150 days of receipt of complaint.   |                             | Approved KPM   |                     | 60.00       | 60.00       |
| 3 - Contested Case Actions resolved through settlement – percent of contested case actions that are resolved through informal settlement resolution and prior to a formal hearing before the Office of Administrative Hearings.            |                             | Approved KPM   | 98.00               | 95.00       | 95.00       |
| 4 - Percent of licensees who rate the board-administered exam as “good” or “excellent” as an effective screen for competent and ethical professionals.   |                             | Approved KPM   |                     | 75.00       | 75.00       |
| 5 - CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | Accuracy                    | Approved KPM   | 93.00               | 90.00       | 90.00       |
| 5 - CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | Availability of Information | Approved KPM   | 90.00               | 90.00       | 90.00       |
| 5 - CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | Expertise                   | Approved KPM   | 91.00               | 90.00       | 90.00       |
| 5 - CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | Helpfulness                 | Approved KPM   | 90.00               | 90.00       | 90.00       |

Print Date: 5/14/2013

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# BUDGET NARRATIVE

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**Agency:** REAL ESTATE AGENCY

**Mission:** To provide quality protection for Oregon consumers of real estate, escrow and land development services, balanced with a professional environment conducive to a healthy real estate market.

| Legislatively Proposed KPMs  | Customer Service Category | Agency Request     | Most Current Result | Target 2014 | Target 2015 |
|--|---------------------------|--------------------|---------------------|-------------|-------------|
| 5 - CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | Overall                   | Approved KPM       | 91.00               | 90.00       | 90.00       |
| 5 - CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | Timeliness                | Approved KPM       | 88.00               | 90.00       | 90.00       |
| 1 - Audits Completed – audits completed  |                           | Legislative Delete | 0.00                |             |             |
| 2 - Days to Complete Investigation File Processing – average number of days to complete investigation file processing.   |                           | Legislative Delete | 267.00              |             |             |
| 4 - Successful Exam applicants – percentage of applicants who pass the qualifying examination on the first attempt.  |                           | Legislative Delete | 78.00               |             |             |
| 5 - Online License Renewals – percentage of online renewals compared to total renewal processed by agency.   |                           | Legislative Delete | 77.00               |             |             |

**LFO Recommendation:**

# BUDGET NARRATIVE

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Approve three new measures and the targets for the 2014 and 2015, and delete KPMs #1, 2, 4, 5:

**DELETE KPM#5: Online License Renewals** – percentage of online renewals compared to total renewal processed by agency.

This is no longer a useful measurement because since March 2012, with the successful launch of the Agency's online system, all major licensing transactions are conducted online with a 100% electronic renewal rate.

**DELETE KPM #1 AND REPLACE WITH NEW MEASURE: Compliance Rate Achieved** – Percentage of property managers/principal brokers reviewed who meet compliance within 45 days of a self-administered compliance review.

This measure replaces KPM#1 – Audits Completed – ratio of audits completed to the number of offices. The Oregon Real Estate Agency (OREA) no longer conducts in-person compliance audits. The Agency reviews compliance using self-administered compliance reviews. The Agency uses these surveys to track response rates, non-compliance category and qualitative data meant to provide the Agency with education direction and cultivate performance benchmarks.

**DELETE KPM #2 AND REPLACE WITH NEW MEASURE: Percent of investigations completed within 150 days of receipt of complaint.**

This measure replaces KPM#2 - Days to Complete Investigation File Processing – average number of days to complete investigation file processing. The Legislature directed OREA to develop an improved investigation timeliness measure. During work sessions with DAS and LFO, the Agency reviewed the regulatory measures of other similar state licensing boards, and found that these boards have found this measure useful in improving investigation timeliness.

**DELETE KPM #4 AND REPLACE WITH NEW MEASURE: Percent of licensees who rate the board-administered exam as “good” or “excellent” as an effective screen for competent and ethical professionals.**

This measure replaces KPM#4 - Successful Exam Applicants - percentage of applicants who pass the qualifying examination on the first attempt. The Legislature directed the Oregon Real Estate Agency (OREA) to develop a measure that evaluates whether the exam adequately prepares a licensee for conducting real estate business, including appraising whether exam questions are clear and an appropriate assessment of information an applicant needs to know in order to competently perform in a knowledgeable and ethical manner. Property managers and brokers are required to take an Advanced Practices course beginning in 2013. Educators

# BUDGET NARRATIVE

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will provide the licensees who take this course with a survey to gauge responses. In addition, the Agency will get the survey to principal brokers. This measure will collect feedback on whether or not they feel like they were adequately prepared to become licensees.

**KEEP KPM #3:** Contested Case Actions resolved through settlement – percent of contested case actions that are resolved through informal settlement resolution and prior to a formal hearing before the Office of Administrative Hearings.

Consent agreements are the most efficient and cost-effective method of resolving disciplinary actions. However, it is not uncommon for licensees to decline consent agreements because they want the opportunity to present their position in administrative hearings. The Agency worked with DAS and LFO during the interim to determine if this measure could be modified to provide more meaningful information. Because a replacement measure was not determined over the course of these discussions, LFO recommends keeping this measure.

**Sub-Committee Action:**

The Subcommittee approved the LFO recommendations.

# BUDGET NARRATIVE

## Real Estate Agency

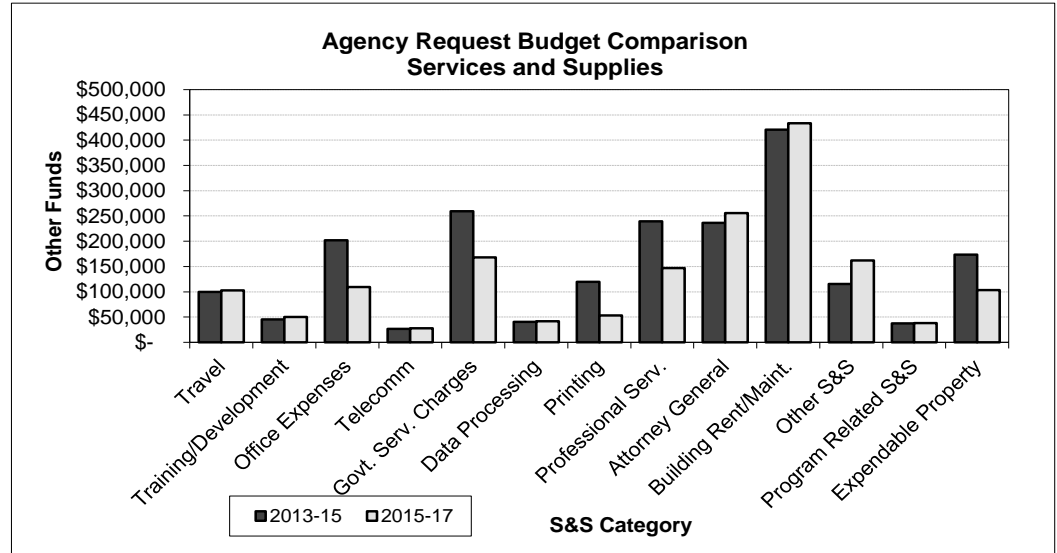
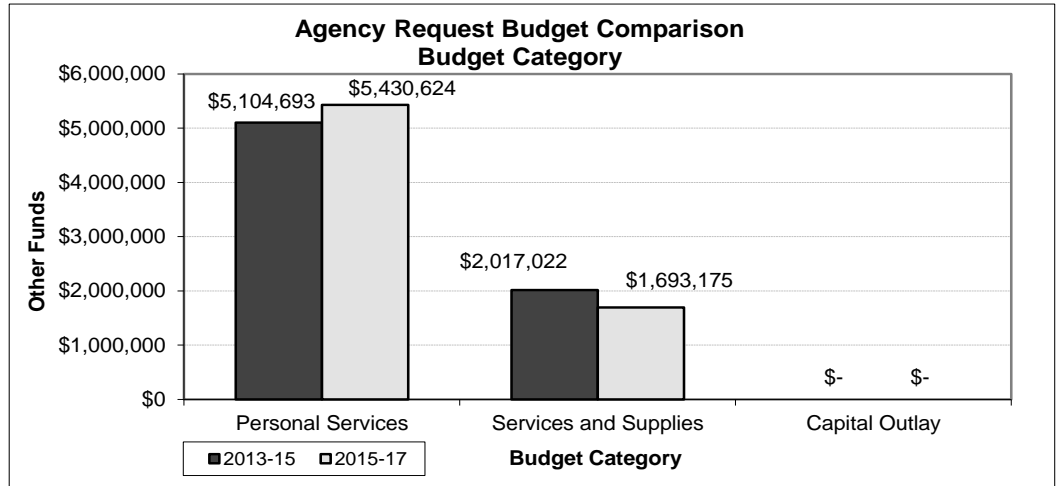
### Governor's Balanced Budget Comparison (All Other Funds)

#### Budget Category

|                       | 2013-15          | 2015-17          | Difference   |
|-----------------------|------------------|------------------|--------------|
| Personal Services     | \$ 5,104,693     | \$ 5,430,624     | \$ 325,931   |
| Services and Supplies | \$ 2,017,022     | \$ 1,693,175     | \$ (323,847) |
| Capital Outlay        | \$ -             | \$ -             | \$ -         |
| <b>Total</b>          | <b>7,121,715</b> | <b>7,123,799</b> | <b>2,084</b> |

#### Services and Supplies

|                      | 2013-15             | 2015-17             | Difference          |
|----------------------|---------------------|---------------------|---------------------|
| Travel               | \$ 99,629           | \$ 102,618          | \$ 2,989            |
| Training/Development | \$ 45,422           | \$ 50,461           | \$ 5,039            |
| Office Expenses      | \$ 201,869          | \$ 109,191          | \$ (92,678)         |
| Telecomm             | \$ 26,814           | \$ 27,618           | \$ 804              |
| Govt. Serv. Charges  | \$ 259,641          | \$ 167,847          | \$ (91,794)         |
| Data Processing      | \$ 40,732           | \$ 41,954           | \$ 1,222            |
| Printing             | \$ 119,804          | \$ 53,398           | \$ (66,406)         |
| Professional Serv.   | \$ 239,625          | \$ 146,813          | \$ (92,812)         |
| Attorney General     | \$ 236,623          | \$ 255,955          | \$ 19,332           |
| Building Rent/Maint. | \$ 421,009          | \$ 433,656          | \$ 12,647           |
| Other S&S            | \$ 115,312          | \$ 161,805          | \$ 46,493           |
| Program Related S&S  | \$ 37,258           | \$ 38,376           | \$ 1,118            |
| Expendable Property  | \$ 173,284          | \$ 103,483          | \$ (69,801)         |
| <b>Total</b>         | <b>\$ 2,017,022</b> | <b>\$ 1,693,175</b> | <b>\$ (323,847)</b> |



# BUDGET NARRATIVE

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## REAL ESTATE AGENCY

### Agency Summary

#### Mission Statement & Statutory Authority

The mission of the Oregon Real Estate Agency is:

*Provide quality protection for “Oregon Consumers” of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy real estate market.*

The statutes and rules administered by the Agency are:

- Real Estate, Property Management, ORS 696.010 to 696.495, 696.710 to 696.785, 696.990 to 696.995
- Escrow, ORS 696.505 to 696.590 and 696.990
- Oregon Subdivision and Series Partition Control Statutes, ORS 92.305 to 92.990
- Condominiums, ORS 100.005 to 100.990
- Timeshare Estates, Membership Campgrounds, ORS 94.803 to 94.989
- Telemarketing Organizations, ORS 696.392, 696.600 to 696.785 and 696.995
- Administrative Rules, Chapter 863, Divisions 1-60

# BUDGET NARRATIVE

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## Agency Plans

### *2015-17 Short-term Agency Plan*

Although the real estate market hasn't returned to the frantic pace of 2007 activity, where at the peak of the market, there were 24,612 individual real estate licensees in Oregon, it continues to improve. In 2014, there are approximately 19,000 individual licenses. Current data shows that the number of persons seeking to enter the real estate industry has declined to levels that are more typical in a regular economy. Recent real estate market indicators in Oregon give the Agency reason to believe an upturn in the number of Oregon licensees will continue. The Agency will continue its efforts to achieve its mission and service levels that lead to quality protection for Oregon consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy real estate market. The Agency will put considerable emphasis on education and compliance along with its licensing and regulatory programs. The Agency has made considerable efforts to audit more Clients' Trust Accounts and will continue this work into the 2015-17 biennium. In addition, the Agency will continue to further improve its customer service efforts through its eLicense system; continually refining the system to meet the licensee and the general public's needs.

### *2015-21 Long-term Agency Plan*

Long term, the Agency will advance its mission to provide quality protection for Oregon consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy real estate market. The Agency will do so by faithfully administering the laws and rules for which it is responsible: developing educational standards and providing educational services, issuing and renewing licenses to qualified persons, and protecting Oregon real estate consumers through prevention, education and enforcement. The Agency plans to measure its performance in several ways. With the Department of Administrative Services and Legislative input, the Agency recently identified three new measures of its effectiveness. The first captures the percent of property managers and principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review. Success will be determined based on meeting at least a 90% compliance rate. This will measure how well the Agency prepares its licensees to comply with laws and rules. The second measure is also intended to capture the Agency's performance in preparing a licensee for conducting real estate business and thereby reducing potential harm to the consumer. The performance measurement here will be the percent of property managers and principal brokers who rate the Board-administered exam as "good" or "excellent" as an effective screen for competent and ethical professionals. Success will be a positive response rate of at least 75%. Finally, the Agency plans to continue to measure the effectiveness of its regulatory program performance. The measurement is the percent of cases investigated within 150 days of receipt of complaint. Success is measured by attaining at least 60%. The Agency's long-term plan centers on improvements in this effort.

# BUDGET NARRATIVE

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## Program Descriptions

The primary divisions and programs of the Real Estate Agency are:

- Office of the Real Estate Commissioner

The Real Estate Commissioner's office provides leadership and policy direction to the various divisions and programs of the Real Estate Agency. The Commissioner's office is responsible for the drafting of notices of intent and other administrative orders, final administrative actions taken, drafting of legislation and rules.

- Real Estate Board

The Board advises the Governor and the Real Estate Commissioner on real estate industry matters, reviews rulemaking proposals and oversees the Agency testing and examination of real estate applicants. The Board meets 6 times annually to review the business of the agency, hear requests for waivers and recommend new actions to the Agency and the Real Estate Commissioner.

- Real Estate Agency Divisions

### *Education Division*

The Oregon Real Estate Agency established an Education Division after the 2007 Legislative Session. The purpose of this division is to research and implement means of providing educational information to real estate licensees. The division collects and analyzes information about the educational needs of the real estate industry and reviews certain educational courses. The division collaborates with the Commissioner and the Board to improve the Agency's external educational efforts.

The Education Division carries out the Agency's mission by increasing the quality, format and number of educational opportunities for licensees that will, in turn, increase the professionalism among licensees. The division strives to provide excellent customer service and has the following goals:

- Create educational opportunities that meet the needs of the industry and the consumer
- Research and utilize technology and other tools to effectively deliver information
- Develop and implement effective licensing examinations
- Develop and publish educational information including website content, brochures, and publications
- Develop and publish forms that are consistent throughout the Agency

Program Functions:

# BUDGET NARRATIVE

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## Education Services:

- certifies continuing education providers
- coordinates the development and periodic review of real estate educational guidelines
- approves pre-license courses and instructors
- reviews and approves post-license education courses
- maintains and promotes escrow education requirements

## Examination Services:

- coordinates the development and maintenance of examinations and test items

## *Business and Licensing Services Division*

In 2012, the previously stand-alone licensing section combined with the Agency's Administrative Services Division. This Division manages business services for the Agency, including:

- Budget/allotment preparation;
- Fiscal services, including inventory control, remittance processing of revenue, accounts payable and receivable, payroll, and travel coordination;
- Human resources coordination;
- Purchasing and contracting;
- Administrative support to the Board and Commissioner; and
- Oversight of the Agency's Information Systems staff, who provide word, data processing, LAN administration, and telecommunications services.

The Division is also responsible for:

- Assisting real estate brokers, principal brokers, property managers and escrow agencies as they use the Agency's eLicense to manage their licenses;
- Assisting customers as they process registered business names and branch office registrations in eLicense;
- Registration of membership campground contract brokers;
- Completing license applicant criminal background checks investigations;
- Processing escrow licensing and security/bonding files;
- Maintaining all licensing history records, and the electronic processing of fees;
- Providing general reception and licensing information to the public.



# BUDGET NARRATIVE

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## *Land Development Division*

The Division is responsible for administering the Land Development Programs, which include subdivision, condominium, timeshare and campground registrations, telemarketing organization licensing, on-site inspections, and Public Report issuance and administering the Telemarketing Organizations Program, which licenses and regulates real estate telemarketing organizations.

## *Regulation Division*

The Division investigates complaints made by the public, licensees, other governmental agencies, or upon its own motion, into the activities of real estate brokers, property managers, escrow agencies, subdivision, condominium, timeshare, campground developments, telemarketing organizations, and other governmental agency real estate-related investigations. Division staff acts as impartial investigators and gather facts surrounding an open complaint file. Division staff conducts stipulation processing (dispute resolution) to resolve matters without a contested case hearing. Investigators assist the Agency's Assistant Attorney General in the preparation of contested cases for hearing and, if necessary, assist other criminal justice agencies in investigations, court testimony, and case preparation. The Division processes and maintains escrow licensing and security/bonding files, land development records, audit and complaint files.

*Purpose.* The purpose of Agency programs is to achieve the Agency's mission to provide quality protection for Oregon Consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy real estate market.

*Customers.* The Agency's customers include:

- General public involved in or having an interest in real estate, property management, escrow, and land development activities; as complainants against licensees and registrants; and for informational requests.
- Applicants for licensure.
- Licensees/registrants, including real estate brokers, property managers, organizations, escrow agents, escrow branch offices, campground brokers, and telemarketing organizations.
- Developers of subdivisions, condominiums, timeshare estates, and membership campgrounds.
- Attorneys representing members of the public, licensees, developers with questions on application of law or in matters of complaint and/or administrative sanction.

## BUDGET NARRATIVE

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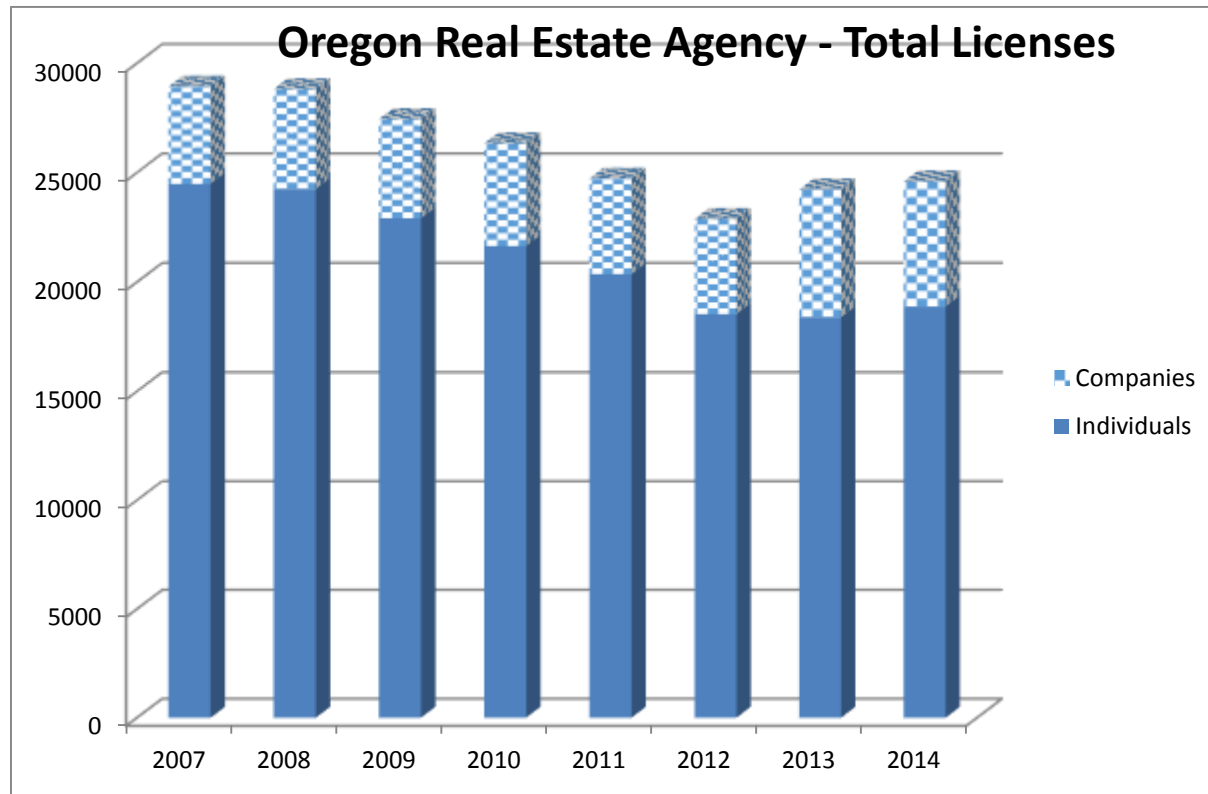
- Public and private schools offering pre- and post-license real estate courses.
- Professional organizations representing real estate, escrow, property management, home building, land development, timeshares, campground marketing, and educational interests.
- Governmental organizations including local District Attorneys, police, and land planning organizations; the Oregon Attorney General, Consumer Protection and Criminal Justice Divisions, State Police, Housing Agency, Department of Veterans' Affairs, Department of Administrative Services, and other state agencies, both in and out of Oregon; federal HUD, Department of Veterans' Affairs, Farm Home Loan Administration, FBI, FTC, IRS, and other enforcement agencies; and other state and provincial Real Estate Agencies.

*Source of Funding.* The Agency's revenue source is Other Funds derived primarily from licensing fees.

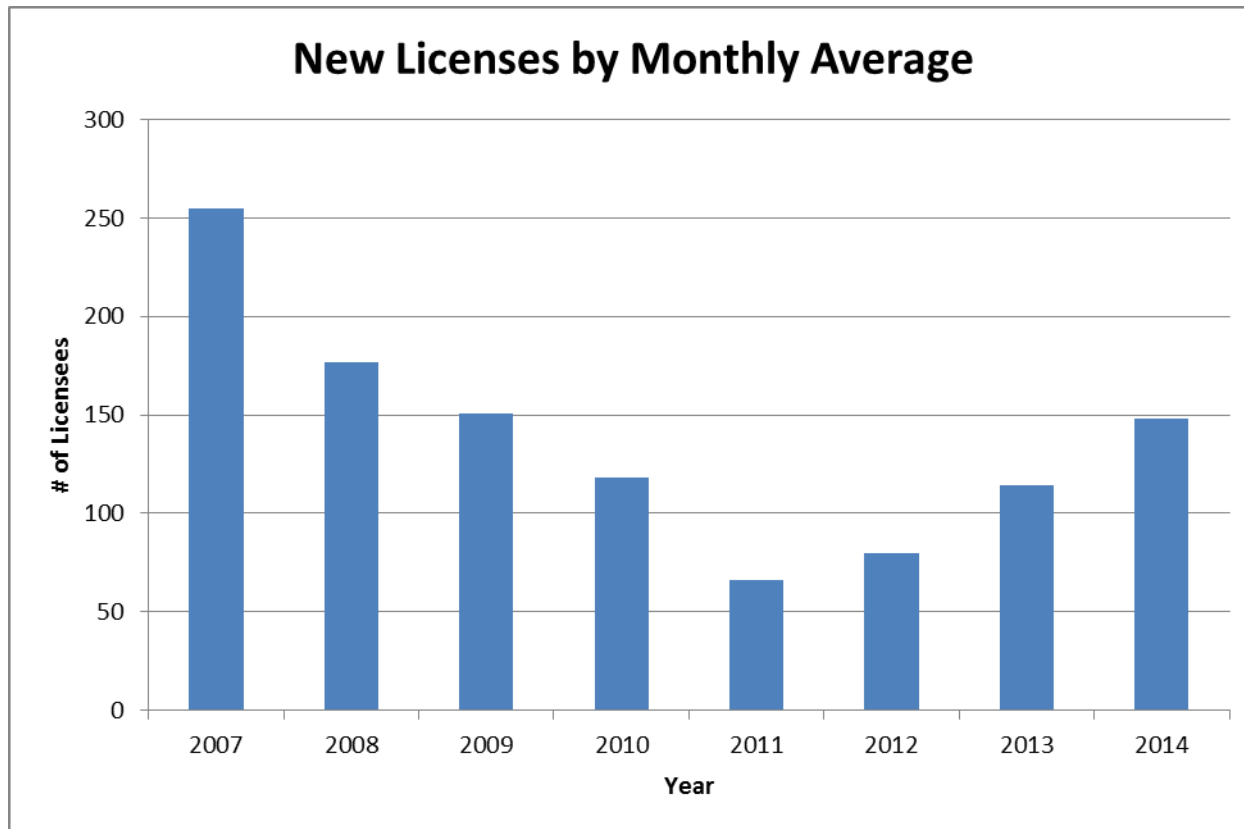
*Expenditures.* Other Funds expenditures requested in the Governor's Balanced Budget for 2015-17 are \$7,123,799.

*FTE.* Full time equivalent positions authorized by the Agency's 2015-17 Governor's Balanced Budget – 29.00.

# BUDGET NARRATIVE



# BUDGET NARRATIVE



# BUDGET NARRATIVE

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## Environmental Factors

### *Industry Environment*

License totals continue to increase, but the increase seems to be gradual. Indicators in several local markets bear good news for the real estate industry. Rising home prices in several key markets and the continuation of low interest rates point toward continued improvement in the industry. Continued growth in licensees is expected over the next two years and the pace of growth will likely continue to be steady. The Agency's 2015-17 revenue projection is \$6,226,309 Other Funds. This assumption is based on the same revenue growth the Agency has experienced over the past two years.

There are several factors that are currently influencing the real estate industry:

- Conventional mortgage rates have risen nationally from 3.35 percent May, 2013 to 4.35 percent in July, 2014. To a generation used to mortgage interest rates below 4 percent, the rise is playing out to be quite a shock. The last 30 years of falling interest rates however is likely over and rates are expected to steadily increase over time.
- Home prices are expected to rise in 2014, but at a slower pace compared to historical trends. Most economists are expecting a national increase in home prices of 4% over the next year.
- The percentage of consumers who intend to buy a home in the next six months is the highest since 2000. Adding to the push: Pent-up demand among young people who, hampered by lack of jobs or insufficient income, have been living in their parents' basements or sharing apartments with roommates. The economy is expected to expand enough in the coming year to enable young people to begin moving out. They'll probably rent first, but low vacancy rates and higher rents will prompt some renters to move on to homeownership.
- As home prices continue to rise, more owners who had been underwater—meaning that they owed more on their mortgage than their home was worth—will emerge from the sidelines and start selling and buying homes. Almost 3.5 million homeowners were lifted out of negative equity between the end of 2012 and mid-2013.

The information above comes from a quarterly report prepared by Portland State University, School of Business Administration: Center for Real Estate, the Mail Tribune, and Kiplinger.

### **Administrative Environment**

No new legislation that significantly impacts the Real Estate Agency or its licensees has been recently passed. Senate Bill 23 (2013) was the last measure filed by the Governor on behalf of the Agency. The purpose of that bill was to make technical and housekeeping amendments to certain statutes within ORS Chapter 696, the Oregon Real Estate License Law. The amendments were for readability, to clarify certain provisions and to provide the Agency with specific rulemaking authority.

# BUDGET NARRATIVE

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## **Internal Environment**

### **Staffing**

The Agency will continue to measure customer service delivery via monthly electronic surveys. The Agency will assess the existing talents and skills of employees as well as determine needed training to maximize efficiency and customer service.

The Agency currently has no vacant positions. The Agency has reorganized several times over the last few years to decrease its spending levels and to ensure the coverage of existing workload.

### **Technology and Systems**

In March 2012, the Agency implemented a new licensing database, purchased from Iron Data, Inc., that broadened the services offered electronically to licensees and consumers. The previous system only allowed for limited online renewals (within the same status) and the ability for the public to look up license statuses. The new system automated several processes and enhanced the features that were available to licensees, such as initial applications, transfers and information updates. Over the past two years a workload reduction in back office transactions has been realized, as was the allowance for some redistribution of staff resources as efficiencies were recognized. The impact of the efficiencies gained by the system has exceeded expectations. All of the Agency's business transactions have moved to eLicense, replacing the manual input of licensee information by staff. Applications and other business transactions are no longer coming in by mail. Previously, approximately 1,200 transactions were received per month by mail, requiring manual input into the licensing system by staff.

As licensees have embraced the new streamlined processes, phone volume has declined. Calls focus less on system failure and error rates and more on technical support. The Agency is focused on efforts to continue to provide resources to licensees as they conduct business online.

The system now processes all business applications and revenue for the Oregon Real Estate Agency, with the exception of fees for public records, condominium filings, and civil penalty payments. The Agency is currently working to bring these remaining business processes online.

The system has enabled the Agency to reduce spending significantly by reorganizing positions and reducing expenses such as, paper, postage and printing. Most significantly, redundant data entry by licensees and staff is prevented and licensee information is kept current.

The following applications are now online and processed in eLicense:

1. New applications
  - a. Broker
  - b. Principal Broker
  - c. Property Manager

## BUDGET NARRATIVE

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2. License Renewals
3. License Transfers
4. Change of Address/Update Personal Information
5. Maintenance of Clients' Trust Account Information
6. Activate/Inactivate License
7. Registered Business Name Application
8. Registered Branch Office Application
9. Legal Name Change
10. Requests of Certified License History

Online processing of all applications is required. The Agency accepts credit and debit card payment through Visa and MasterCard, and electronic checks. The Commissioner stringently enforces the Agency's policy of requiring the use of its eLicense system.

### **Consumer Protection**

The Agency will review its effectiveness in protecting consumers via its education, licensing and enforcement roles. The Agency will strive for a competent licensed real estate community through the approval of courses and instructors, the development of licensing examinations, and the publishing of information.

### **Accountability**

The Agency is tracking a few new performance measures in addition to still tracking historical measures in most cases. The Agency will continue to work closely with BAM and LFO to monitor the new measures.

The Agency will continue to be prudent in exercising its expenditure authority. The Agency also remains committed to the principles of transparency and public accountability. All employee compensation, agency revenue and expenditure data, and public meeting notices are posted on a public website (the Oregon Transparency Website) through the Department of Administrative Services.

### **Agency Initiatives**

The Agency continues to review the Oregon Revised Statutes and Oregon Administrative Rules that direct the Agency's authority and procedures on an ongoing basis. Collaborative work groups will be formed in the 2015-17 biennium for this review process as needed. The work groups have historically included the Commissioner, Agency staff, board members, and industry representatives in the areas of real estate brokerage, property management, and escrow. The work groups are generally charged with conducting a review of the Administrative Rules resulting in clear and concise language for implementation of standards and regulation, as well as, developing Legislative Concepts

# BUDGET NARRATIVE

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## **Criteria for 2015-17 Budget Development**

The goals inherent in the Agency's mission are used as the basis to develop the budget proposal: to provide quality protection for Oregon consumers of real estate related services, regulate in a manner that supports a positive real estate market, and provide excellent customer service.

To achieve its goals, the budget criteria are to:

- Maintain the existing licensing fees.
- Continue to keep the Board and industry actively involved with the Agency and the Commissioner.
- Provide adequate Attorney General, building rental, data processing services and office supplies limitation to maintain the current program level.
- Maintain an adequate ending balance.

## **Major Information Technology Projects \$1,000,000+**

Not applicable to the Real Estate Agency.

## **Information Technology Projects \$150,000+**

Not applicable to the Real Estate Agency.

## **Sustainability**

Not applicable to the Real Estate Agency.

**Other Considerations - None.**



# BUDGET NARRATIVE

## Summary of 2015-17 Governor's Balanced Budget 919 Real Estate Agency

|   | TOTALS |        |               | FUND TYPE    |               |               |               |                  |         |
|---|--------|--------|---------------|--------------|---------------|---------------|---------------|------------------|---------|
|   | POS    | FTE    | ALL FUNDS     | General Fund | Lottery Funds | Other Funds   | Federal Funds | Nonlimited Other | Federal |
| <b>2013-15 LEGISLATIVELY ADOPTED BUDGET</b>     | 30     | 30.00  | 7,053,979     |              |               | 7,053,979     |               |                  |         |
| 2013-15 Emergency Board Actions                 |        | (0.25) | 223,678       |              |               | 223,678       |               |                  |         |
| <b>2013-15 Legislatively Approved Budget</b>    | 30     | 29.75  | 7,277,657     |              |               | 7,277,657     |               |                  |         |
| <b>Base Budget Adjustments:</b>                 |        |        |               |              |               |               |               |                  |         |
| Net Cost of Position Actions:                   |        |        |               |              |               |               |               |                  |         |
| Administrative, Biennialized E-Board, Phase-Out |        |        | 152,578       |              |               | 152,578       |               |                  |         |
| Estimated Cost of Merit Increase                |        |        |               |              |               |               |               |                  |         |
| Base Debt Service Adjustment                    |        |        |               |              |               |               |               |                  |         |
| Base Nonlimited Adjustment                      |        |        |               |              |               |               |               |                  |         |
| Capital Construction Adjustment                 |        |        |               |              |               |               |               |                  |         |
| <b>Subtotal: 2015-17 Base Budget</b>            | 30     | 29.75  | 7,430,235     |              |               | 7,430,235     |               |                  |         |
| <b>Essential Packages:</b>                      |        |        |               |              |               |               |               |                  |         |
| <b>Package No. 010</b>                          |        |        |               |              |               |               |               |                  |         |
| Vacancy Factor Increase                         |        |        | 62,892        |              |               | 62,892        |               |                  |         |
| Non-PICS Personal Service Increase              |        |        | <u>22,042</u> |              |               | <u>22,042</u> |               |                  |         |
| Subtotal  |        |        | <b>84,934</b> |              |               | <b>84,934</b> |               |                  |         |
| <b>Package No. 021/022</b>                      |        |        |               |              |               |               |               |                  |         |
| 021 - Phased-In Programs Excl. One-Time Costs   |        |        |               |              |               |               |               |                  |         |
| 022 - Phase-Out Programs and One-Time Costs     |        |        |               |              |               |               |               |                  |         |
| Subtotal  |        |        |               |              |               |               |               |                  |         |
| <b>Package No. 030</b>                          |        |        |               |              |               |               |               |                  |         |
| Cost of Goods & Services Increase               |        |        | 76,315        |              |               | 76,315        |               |                  |         |
| State Gov. Service Charges Increase             |        |        | <u>12,315</u> |              |               | <u>12,315</u> |               |                  |         |
| Subtotal  |        |        | <b>88,630</b> |              |               | <b>88,630</b> |               |                  |         |

# BUDGET NARRATIVE

|  |           |              |                  |  |  |  |                  |  |  |  |
|--|-----------|--------------|------------------|--|--|--|------------------|--|--|--|
| <b>Package No. 040</b>                                   |           |              |                  |  |  |  |                  |  |  |  |
| Mandated Caseload Increase/Decrease                      |           |              |                  |  |  |  |                  |  |  |  |
| <b>Package No. 050</b>                                   |           |              |                  |  |  |  |                  |  |  |  |
| Fund Shifts  |           |              |                  |  |  |  |                  |  |  |  |
| <b>Package No. 060</b>                                   |           |              |                  |  |  |  |                  |  |  |  |
| Technical Adjustments                                    |           |              |                  |  |  |  |                  |  |  |  |
| <b>Subtotal: 2015-17 Essential Budget Level</b>          | 30        | 29.75        | 7,603,799        |  |  |  | 7,603,799        |  |  |  |
| <b>Subtotal: 2015-17 Modified Essential Budget Level</b> | 30        | 29.75        | 7,603,799        |  |  |  | 7,603,799        |  |  |  |
| <b>Subtotal Emergency Board Packages</b>                 |           |              |                  |  |  |  |                  |  |  |  |
| <b>Subtotal Policy Packages</b>                          | (1)       | (0.75)       | (480,000)        |  |  |  | (480,000)        |  |  |  |
| <b>Total: 2015-17 Budget</b>                             | <b>29</b> | <b>29.00</b> | <b>7,123,799</b> |  |  |  | <b>7,123,799</b> |  |  |  |

|   |         |         |         |     |     |         |     |     |     |
|---|---------|---------|---------|-----|-----|---------|-----|-----|-----|
| Percent Change From 2013-15 Leg. Approved         | --3.33% | --2.52% | -2.11%  | --% | --% | -2.11%  | --% | --% | --% |
| Percent Change From 2015-17 Current Service Level | --3.33% | --2.52% | --6.31% | --% | --% | --6.31% | --% | --% | --% |

# BUDGET NARRATIVE

## Summary of 2015-17 Biennium Budget

**Real Estate Agency** Governor's Budget  
**Real Estate Agency** Cross Reference Number: 91900-000-00-00-00000  
**2015-17 Biennium**

| Description  | Positions | Full-Time Equivalent (FTE) | ALL FUNDS        | General Fund | Lottery Funds | Other Funds      | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|
| 2013-15 Leg Adopted Budget                         | 30        | 30.00                      | 7,053,979        | -            | -             | 7,053,979        | -             | -                      | -                        |
| 2013-15 Emergency Boards                           | -         | (0.25)                     | 223,678          | -            | -             | 223,678          | -             | -                      | -                        |
| 2013-15 Leg Approved Budget                        | 30        | 29.75                      | 7,277,657        | -            | -             | 7,277,657        | -             | -                      | -                        |
| <b>2015-17 Base Budget Adjustments</b>             |           |                            |                  |              |               |                  |               |                        |                          |
| Net Cost of Position Actions                       |           |                            |                  |              |               |                  |               |                        |                          |
| Administrative Biennialized E-Board, Phase-Out     | -         | -                          | 152,578          | -            | -             | 152,578          | -             | -                      | -                        |
| Estimated Cost of Merit Increase                   | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Debt Service Adjustment                       | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Nonlimited Adjustment                         | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Capital Construction                               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal 2015-17 Base Budget</b>                | <b>30</b> | <b>29.75</b>               | <b>7,430,235</b> | <b>-</b>     | <b>-</b>      | <b>7,430,235</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>Essential Packages</b>                          |           |                            |                  |              |               |                  |               |                        |                          |
| 010 - Non-PICS Pers Svc/Vacancy Factor             |           |                            |                  |              |               |                  |               |                        |                          |
| Vacancy Factor (Increase)/Decrease                 | -         | -                          | 62,892           | -            | -             | 62,892           | -             | -                      | -                        |
| Non-PICS Personal Service Increase/(Decrease)      | -         | -                          | 22,042           | -            | -             | 22,042           | -             | -                      | -                        |
| <b>Subtotal</b>                                    | <b>-</b>  | <b>-</b>                   | <b>84,934</b>    | <b>-</b>     | <b>-</b>      | <b>84,934</b>    | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| 020 - Phase In / Out Pgm & One-time Cost           |           |                            |                  |              |               |                  |               |                        |                          |
| 021 - Phase-in                                     | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| 022 - Phase-out Pgm & One-time Costs               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal</b>                                    | <b>-</b>  | <b>-</b>                   | <b>-</b>         | <b>-</b>     | <b>-</b>      | <b>-</b>         | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| 030 - Inflation & Price List Adjustments           |           |                            |                  |              |               |                  |               |                        |                          |
| Cost of Goods & Services Increase/(Decrease)       | -         | -                          | 76,315           | -            | -             | 76,315           | -             | -                      | -                        |
| State Gov't & Services Charges Increase/(Decrease) | -         | -                          | 12,315           | -            | -             | 12,315           | -             | -                      | -                        |

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# BUDGET NARRATIVE

## Summary of 2015-17 Biennium Budget

Real Estate Agency  
 Real Estate Agency  
 2015-17 Biennium

Governor's Budget  
 Cross Reference Number: 91900-000-00-00-00000

| <i>Description</i>                             | <i>Positions</i> | <i>Full-Time<br/>Equivalent<br/>(FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery<br/>Funds</i> | <i>Other Funds</i> | <i>Federal<br/>Funds</i> | <i>Nonlimited<br/>Other Funds</i> | <i>Nonlimited<br/>Federal<br/>Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| Subtotal                                       | -                | -   | 88,630           | -                   | -                        | 88,630             | -                        | -                                 | -                                       |
| 040 - Mandated Caseload                        |                  |   |                  |                     |                          |                    |                          |                                   |   |
| 040 - Mandated Caseload                        | -                | -   | -                | -                   | -                        | -                  | -                        | -                                 | -                                       |
| 050 - Fundshifts and Revenue Reductions        |                  |   |                  |                     |                          |                    |                          |                                   |   |
| 050 - Fundshifts                               | -                | -   | -                | -                   | -                        | -                  | -                        | -                                 | -                                       |
| 060 - Technical Adjustments                    |                  |   |                  |                     |                          |                    |                          |                                   |   |
| 060 - Technical Adjustments                    | -                | -   | -                | -                   | -                        | -                  | -                        | -                                 | -                                       |
| <b>Subtotal: 2015-17 Current Service Level</b> | <b>30</b>        | <b>29.75</b>                              | <b>7,603,799</b> | <b>-</b>            | <b>-</b>                 | <b>7,603,799</b>   | <b>-</b>                 | <b>-</b>                          | <b>-</b>                                |

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## Summary of 2015-17 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2015-17 Biennium

Governor's Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description  | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-----------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| <b>Subtotal: 2015-17 Current Service Level</b>       | 30        | 29.75                      | 7,603,799 | -            | -             | 7,603,799   | -             | -                      | -                        |
| 070 - Revenue Reductions/Shortfall                   |           |                            |           |              |               |             |               |                        |                          |
| 070 - Revenue Shortfalls                             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Modified 2015-17 Current Service Level</b>        | 30        | 29.75                      | 7,603,799 | -            | -             | 7,603,799   | -             | -                      | -                        |
| 080 - E-Boards                                       |           |                            |           |              |               |             |               |                        |                          |
| 080 - May 2014 E-Board                               | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| 081 - September 2014 E-Board                         | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Subtotal Emergency Board Packages</b>             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| Policy Packages                                      |           |                            |           |              |               |             |               |                        |                          |
| 090 - Analyst Adjustments                            | (1)       | (0.75)                     | (480,000) | -            | -             | (480,000)   | -             | -                      | -                        |
| <b>Subtotal Policy Packages</b>                      | (1)       | (0.75)                     | (480,000) | -            | -             | (480,000)   | -             | -                      | -                        |
| <b>Total 2015-17 Governor's Budget</b>               | 29        | 29.00                      | 7,123,799 | -            | -             | 7,123,799   | -             | -                      | -                        |
| Percentage Change From 2013-15 Leg Approved Budget   | -3.33%    | -2.52%                     | -2.11%    | -            | -             | -2.11%      | -             | -                      | -                        |
| Percentage Change From 2015-17 Current Service Level | -3.33%    | -2.52%                     | -6.31%    | -            | -             | -6.31%      | -             | -                      | -                        |

# BUDGET NARRATIVE

## Summary of 2015-17 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2015-17 Biennium

Governor's Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description  | Positions | Full-Time Equivalent (FTE) | ALL FUNDS        | General Fund | Lottery Funds | Other Funds      | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|
| 2013-15 Leg Adopted Budget                         | 30        | 30.00                      | 7,053,979        | -            | -             | 7,053,979        | -             | -                      | -                        |
| 2013-15 Emergency Boards                           | -         | (0.25)                     | 223,678          | -            | -             | 223,678          | -             | -                      | -                        |
| <b>2013-15 Leg Approved Budget</b>                 | <b>30</b> | <b>29.75</b>               | <b>7,277,657</b> | <b>-</b>     | <b>-</b>      | <b>7,277,657</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>2015-17 Base Budget Adjustments</b>             |           |                            |                  |              |               |                  |               |                        |                          |
| Net Cost of Position Actions                       |           |                            |                  |              |               |                  |               |                        |                          |
| Administrative Biennialized E-Board, Phase-Out     | -         | -                          | 152,578          | -            | -             | 152,578          | -             | -                      | -                        |
| Estimated Cost of Merit Increase                   | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Debt Service Adjustment                       | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Nonlimited Adjustment                         | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Capital Construction                               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal 2015-17 Base Budget</b>                | <b>30</b> | <b>29.75</b>               | <b>7,430,235</b> | <b>-</b>     | <b>-</b>      | <b>7,430,235</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>Essential Packages</b>                          |           |                            |                  |              |               |                  |               |                        |                          |
| 010 - Non-PICS Pers Svc/Vacancy Factor             |           |                            |                  |              |               |                  |               |                        |                          |
| Vacancy Factor (Increase)/Decrease                 | -         | -                          | 62,892           | -            | -             | 62,892           | -             | -                      | -                        |
| Non-PICS Personal Service Increase/(Decrease)      | -         | -                          | 22,042           | -            | -             | 22,042           | -             | -                      | -                        |
| <b>Subtotal</b>                                    | <b>-</b>  | <b>-</b>                   | <b>84,934</b>    | <b>-</b>     | <b>-</b>      | <b>84,934</b>    | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| 020 - Phase In / Out Pgm & One-time Cost           |           |                            |                  |              |               |                  |               |                        |                          |
| 021 - Phase-in                                     | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| 022 - Phase-out Pgm & One-time Costs               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal</b>                                    | <b>-</b>  | <b>-</b>                   | <b>-</b>         | <b>-</b>     | <b>-</b>      | <b>-</b>         | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| 030 - Inflation & Price List Adjustments           |           |                            |                  |              |               |                  |               |                        |                          |
| Cost of Goods & Services Increase/(Decrease)       | -         | -                          | 76,315           | -            | -             | 76,315           | -             | -                      | -                        |
| State Gov't & Services Charges Increase/(Decrease) | -         | -                          | 12,315           | -            | -             | 12,315           | -             | -                      | -                        |

# BUDGET NARRATIVE

## Summary of 2015-17 Biennium Budget

Real Estate Agency  
 Real Estate Agency  
 2015-17 Biennium

Governor's Budget  
 Cross Reference Number: 91900-050-00-00-00000

| <i>Description</i>                             | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|-----------------------------------|------------------|---------------------|----------------------|--------------------|----------------------|-------------------------------|---------------------------------|
| <b>Subtotal</b>                                | -                | -                                 | 88,630           | -                   | -                    | 88,630             | -                    | -                             | -                               |
| 040 - Mandated Caseload                        |                  |                                   |                  |                     |                      |                    |                      |                               |                                 |
| 040 - Mandated Caseload                        | -                | -                                 | -                | -                   | -                    | -                  | -                    | -                             | -                               |
| 050 - Fundshifts and Revenue Reductions        |                  |                                   |                  |                     |                      |                    |                      |                               |                                 |
| 050 - Fundshifts                               | -                | -                                 | -                | -                   | -                    | -                  | -                    | -                             | -                               |
| 060 - Technical Adjustments                    |                  |                                   |                  |                     |                      |                    |                      |                               |                                 |
| 060 - Technical Adjustments                    | -                | -                                 | -                | -                   | -                    | -                  | -                    | -                             | -                               |
| <b>Subtotal: 2015-17 Current Service Level</b> | <b>30</b>        | <b>29.75</b>                      | <b>7,603,799</b> | <b>-</b>            | <b>-</b>             | <b>7,603,799</b>   | <b>-</b>             | <b>-</b>                      | <b>-</b>                        |

# BUDGET NARRATIVE

## Summary of 2015-17 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2015-17 Biennium

Governor's Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description  | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-----------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| <b>Subtotal: 2015-17 Current Service Level</b>       | 30        | 29.75                      | 7,603,799 | -            | -             | 7,603,799   | -             | -                      | -                        |
| 070 - Revenue Reductions/Shortfall                   |           |                            |           |              |               |             |               |                        |                          |
| 070 - Revenue Shortfalls                             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Modified 2015-17 Current Service Level</b>        | 30        | 29.75                      | 7,603,799 | -            | -             | 7,603,799   | -             | -                      | -                        |
| 080 - E-Boards                                       |           |                            |           |              |               |             |               |                        |                          |
| 080 - May 2014 E-Board                               | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| 081 - September 2014 E-Board                         | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Subtotal Emergency Board Packages</b>             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| Policy Packages                                      |           |                            |           |              |               |             |               |                        |                          |
| 090 - Analyst Adjustments                            | (1)       | (0.75)                     | (480,000) | -            | -             | (480,000)   | -             | -                      | -                        |
| <b>Subtotal Policy Packages</b>                      | (1)       | (0.75)                     | (480,000) | -            | -             | (480,000)   | -             | -                      | -                        |
| <b>Total 2015-17 Governor's Budget</b>               | 29        | 29.00                      | 7,123,799 | -            | -             | 7,123,799   | -             | -                      | -                        |
| Percentage Change From 2013-15 Leg Approved Budget   | -3.33%    | -2.52%                     | -2.11%    | -            | -             | -2.11%      | -             | -                      | -                        |
| Percentage Change From 2015-17 Current Service Level | -3.33%    | -2.52%                     | -6.31%    | -            | -             | -6.31%      | -             | -                      | -                        |



# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

**Agencywide Program Unit Summary  
2015-17 Biennium**

**Version: Y - 01 - Governor's Budget**

| <i>Summary<br/>Cross Reference<br/>Number</i> | <i>Cross Reference Description</i> | <i>2011-13<br/>Actuals</i> | <i>2013-15 Leg<br/>Adopted<br/>Budget</i> | <i>2013-15 Leg<br/>Approved<br/>Budget</i> | <i>2015-17<br/>Agency<br/>Request<br/>Budget</i> | <i>2015-17<br/>Governor's<br/>Budget</i> | <i>2015-17 Leg<br/>Adopted<br/>Budget</i> |
|---|------------------------------------|----------------------------|---|--|--|--|---|
| 050-00-00-00000                               | Real Estate Agency                 |                            |   |  |  |  |   |
|   | Other Funds                        | 6,198,690                  | 7,053,979                                 | 7,277,657                                  | 7,628,558  | 7,123,799                                | -   |
| <b>TOTAL AGENCY</b>                           |                                    |                            |   |  |  |  |   |
|   | Other Funds                        | 6,198,690                  | 7,053,979                                 | 7,277,657                                  | 7,628,558  | 7,123,799                                | -   |

\_\_\_\_ Agency Request  
2015-17 Biennium

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\_\_\_\_ Legislatively Adopted  
Agencywide Program Unit Summary - BPR010

# BUDGET NARRATIVE

| Real Estate Agency                              |                |                              |  |  |                                       |    |    |           |       |    |       |              |      |       |                               |                                    |   |    |
|---|----------------|------------------------------|--|--|---------------------------------------|----|----|-----------|-------|----|-------|--------------|------|-------|-------------------------------|------------------------------------|---|----|
| 2015-17 Governor's Balanced Budget              |                |                              |  |  |                                       |    |    |           |       |    |       |              |      |       |                               |                                    |   |    |
| Agency Number: 91900                            |                |                              |  |  |                                       |    |    |           |       |    |       |              |      |       |                               |                                    |   |    |
| Department-Wide Priorities for 2015-17 Biennium |                |                              |  |  |                                       |    |    |           |       |    |       |              |      |       |                               |                                    |   |    |
| 1   | 2              | 3                            | 4  | 5  | 6                                     | 7  | 7  | 9         | 10    | 11 | 12    | 13           | 14   | 15    | 16                            | 17                                 | 18  | 19 |
| Priority (ranked with highest priority first)   | Dept. Initials | Program or Activity Initials | Program Unit/Activity Description  | Identify Key Performance Measure(s)  | Primary Purpose Program-Activity Code | GF | LF | OF        | NL-OF | FF | NL-FF | TOTAL FUNDS  | Pos. | FTE   | New or Enhanced Program (Y/N) | Included as Reduction Option (Y/N) | Legal Req. Code (C, F, or D)                        |    |
| Dept  | Prgm/ Div      |                              |  |  |                                       |    |    |           |       |    |       |              |      |       |                               |                                    |   |    |
|   | 1              |                              | Licensing (applications, renewals, business and branch office registrations). Structurally, this section is now part of the Business Services division (prioritized below).  | KPM 6 - customer service standards   | 3                                     |    |    | 1,424,760 |       |    |       | \$ 1,424,760 | 5    | 6.00  | N                             |                                    | One Administrative Specialist position is included. |    |
|   | 2              |                              | Regulation and Enforcement (Complaints, Investigations, Administrative Actions, Civil Penalty enforcement)   | KPM 2 - Days to complete Investigation<br>KPM 6 - customer service standards   | 3                                     |    |    | 2,049,519 |       |    |       | \$ 2,049,519 | 14   | 14.00 | N                             |                                    | Two Financial Investigator positions are included.  |    |
|   | 3              |                              | Education - Licensee Outreach (mail-in compliance reviews, pre and post license education, exam development)   | KPM 1 - % of property managers/principal brokers reviewed who meet compliance<br>KPM 4 - % of property managers/principal brokers who rate the exam as effective<br>KPM 6 - Customer Service Standards | 7                                     |    |    | 1,068,570 |       |    |       | \$ 1,068,570 | 1    | 1.00  | N                             |                                    | N   |    |
|   | 4              |                              | Land Development (Condo, timeshare, membership campgrounds registrations, Real Estate Marketing Organization licensing & regulation)   | KPM 6 - Customer Service Standards   | 3                                     |    |    | 669,904   |       |    |       | \$ 669,904   | 2    | 2.00  | N                             |                                    | N   |    |
|   |                |                              | Board Support, Commissioner's Office, Administration and IT Staff (Commissioner and Deputy Commissioner's office, Budget, Accounting, Information Technology, Personnel & Payroll, Contracts & Procurement, Real Estate Board and Advisory Group Support, Administrative Rule Reviews and Legislative Concept Development) | KPM 6 - Customer Service Standards   | 4                                     |    |    | 1,211,046 |       |    |       | \$ 1,211,046 | 7    | 7.00  | N                             |                                    | N   |    |
|   |                |                              |  |  |                                       |    |    | 7,123,799 |       |    |       | \$ 7,123,799 | 26   | 29.00 |                               |                                    |   |    |

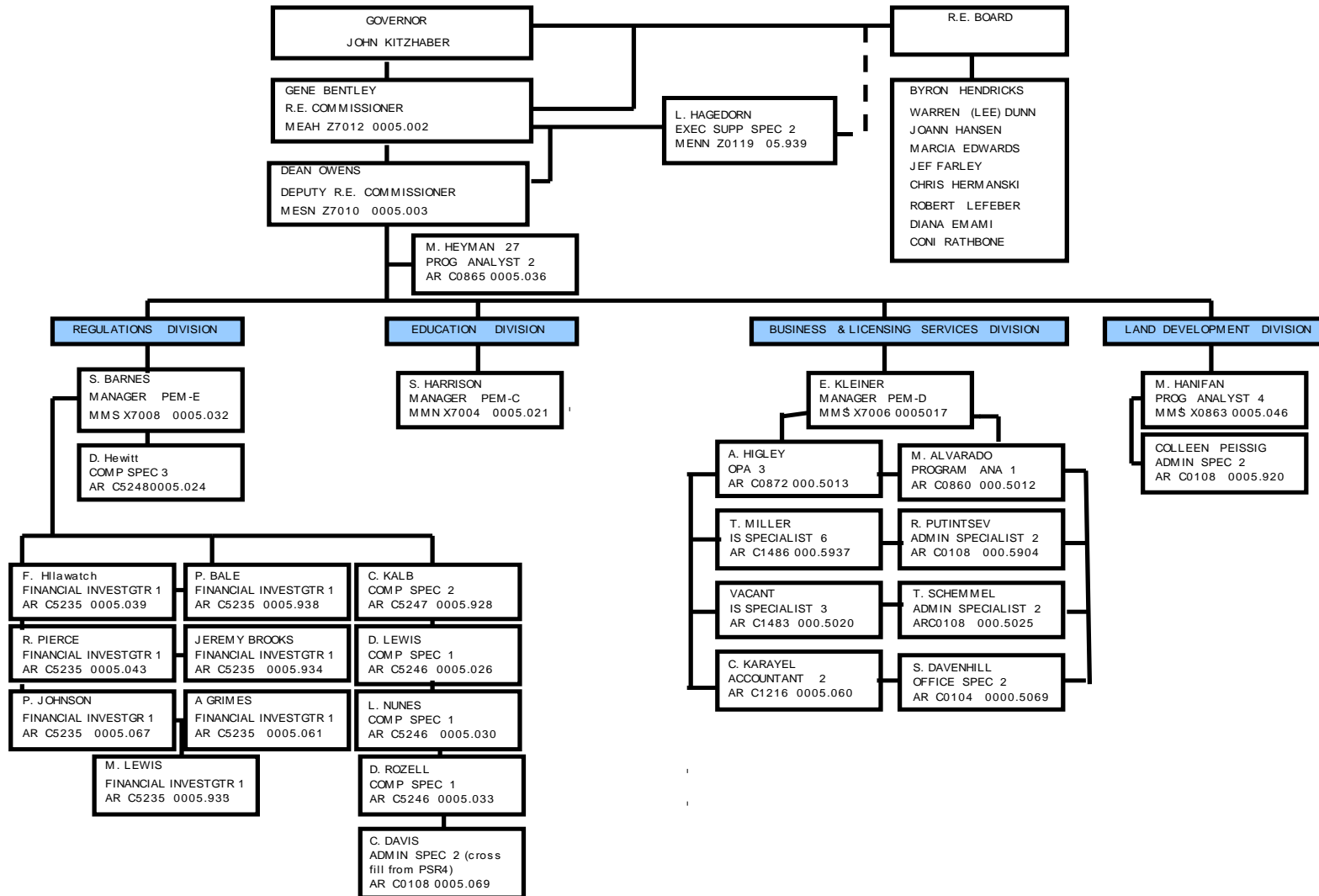
# BUDGET NARRATIVE

## 10% Reduction Options (ORS 291.216)

| ACTIVITY OR PROGRAM<br>(WHICH PROGRAM OR ACTIVITY<br>WILL NOT BE UNDERTAKEN)    | DESCRIBE REDUCTION<br>(DESCRIBE THE EFFECTS OF THIS<br>REDUCTION. INCLUDE POSITIONS AND<br>FTE IN 2013-15 AND 2015-17)  | AMOUNT AND FUND TYPE<br>(GF, LF, OF, FF. IDENTIFY<br>REVENUE SOURCE FOR OF, FF) | RANK AND JUSTIFICATION<br>(RANK THE ACTIVITIES OR PROGRAMS<br>NOT UNDERTAKEN IN ORDER OF<br>LOWEST COST FOR BENEFIT OBTAINED) |
|---|---|---|---|
| 1. Eliminate two Administrative Specialist positions.                           | OTHER EXISTING AGENCY STAFF MEMBERS WOULD BE REQUIRED TO PICK UP THESE DUTIES. LICENSEES WOULD LACK IMMEDIATE CUSTOMER SUPPORT THEREBY IMPACTING THEIR LICENSES.  | \$220,000<br><br>OTHER FUNDS  |   |
| 3. Eliminate two Financial Investigator 1 positions.                            | OTHER EXISTING AGENCY STAFF MEMBERS WOULD BE REQUIRED TO PICK UP THESE DUTIES. DELAYS IN CASE RESOLUTION WOULD BE EXPECTED.   | \$250,000<br><br>OTHER FUNDS  |   |
| 4. Eliminate the use of physical mailings.                                      | LICENSEES WOULD RISK NOT RECEIVING CRITICAL INFORMATION FROM THE AGENCY, POTENTIALLY IMPACTING THEIR ABILITY TO CONDUCT REAL ESTATE BUSINESS IN OREGON.   | \$50,000<br><br>OTHER FUNDS   |   |
| 5. Reduce use of instate and out-of-state travel.                               | AGENCY WOULD CEASE OR DECREASE OUT-OF-AREA BOARD MEETINGS AND EMPLOYEES WOULD NOT BENEFIT FROM TRAINING OFFERED OUTSIDE OF THE SALEM AREA. AGENCY MANAGEMENT WOULD NOT BE ABLE TO CONTINUE PARTICIPATION IN THE ASSOCIATION OF REAL ESTATE LICENSING AND LAW OFFICIALS. | \$100,000<br><br>OTHER FUNDS  |   |
| 6. Reduce use of the Attorney General for legal advice and enforcement actions. | WITHOUT LEGAL ADVICE, THE AGENCY MIGHT INADVERTENTLY TAKE INCORRECT ACTIONS RESULTING IN COSTLY LITIGATION.   | \$92,379<br>OTHER FUNDS   |   |
|   | TOTAL REDUCTIONS  | \$712,379<br>OTHER FUNDS  |   |

# BUDGET NARRATIVE

## 2015-17 REAL ESTATE AGENCY ORGANIZATION CHART



# BUDGET NARRATIVE

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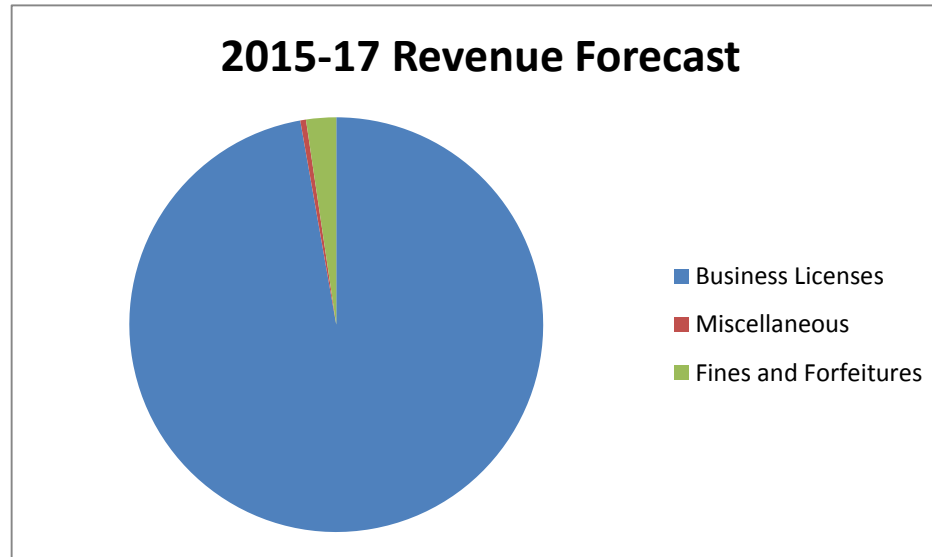
# BUDGET NARRATIVE

## Revenue Discussion

The Oregon Real Estate Agency is entirely self-supported through Other Fund (OF) revenues derived from licensing and other services. All civil penalties assessed by the Agency are transferred to the General Fund in accordance with statute. The fee structure is expected to remain the same as the current biennium; fees have not been raised since the mid-1990s. The Agency has been spending more than actual revenue received over the past several months, decreasing the ending balance. However, the Agency has implemented cost reduction measures to close the gap that exists between expenditures and revenue. Savings from the Agency's vacant positions over the past four years have contributed greatly to reducing this gap. The Agency anticipates relative stability in its revenue stream and current market indicators are pointing to a continued increase in real estate licensees in Oregon.

The following is a summary of fees:

- Licensing or reactivation exam, \$75 and applicant criminal background check, \$47, fees are paid directly to PSI, the Agency's exam vendor.
- Broker or Property Manager license - \$230,
- Renewal for Active Broker or Property Manager license - \$230,
- Renewal for Inactive Broker or Property Manager license - \$110,
- Notification of opening or closing of a branch, transfer or change of name or address of a broker - \$10,
- Duplicate license - \$20, No longer applicable as licenses may be printed online by licensee,
- Reactivation of inactive license for Broker or Property Manager - \$75, and
- Late Renewal - \$30.



# BUDGET NARRATIVE

## Detail of Other Funds Revenue

| Source   | Fund  | ORBITS<br>Revenue<br>Acct | 2011-2013<br>Actual | 2013-15<br>Legislatively<br>Adopted | 2013-15<br>Estimated | 2015-17            |                           |                          |
|--|-------|---------------------------|---------------------|-------------------------------------|----------------------|--------------------|---------------------------|--------------------------|
|  |       |                           |                     |                                     |                      | Agency<br>Request  | Governor's<br>Recommended | Legislatively<br>Adopted |
| Business Licenses  | Other | 205                       | \$4,956,297         | \$5,466,968                         | \$5,566,757          | \$6,065,545        | \$6,065,545               |                          |
| Miscellaneous*   | Other | 410                       | \$93,876            | \$24,933                            | \$37,380             | \$43,333           | \$43,333                  |                          |
| Fines and Forfeitures  | Other | 505                       | \$123,199           | \$131,794                           | \$128,135            | \$117,431          | \$117,431                 |                          |
| Transfer to Gen. Fund  | Other |                           | (\$65,151)          | (\$66,381)                          | (\$66,325)           | (\$50,262)         | (\$50,262)                |                          |
| <b>Total</b>   |       |                           | <b>\$5,108,235</b>  | <b>\$5,557,314</b>                  | <b>\$5,665,947</b>   | <b>\$6,176,047</b> | <b>\$6,176,047</b>        |                          |
| *The Agency no longer receives revenue from fingerprinting or examinations |       |                           |                     |                                     |                      |                    |                           |                          |

Agency Request

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# BUDGET NARRATIVE

## DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Real Estate Agency<br>2015-17 Biennium | Agency Number: 91900<br>Cross Reference Number: 91900-000-00-00-00000 |                               |                                |                                  |                              |                               |
|--|---|-------------------------------|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| Source                                 | 2011-13 Actuals   | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved Budget | 2015-17 Agency<br>Request Budget | 2015-17 Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
| <b>Other Funds</b>                     |   |                               |                                |                                  |                              |                               |
| Business Lic and Fees                  | 4,956,297   | 5,466,968                     | 5,466,968                      | 6,065,545                        | 6,065,545                    | -                             |
| Charges for Services                   | 93,876  | 24,933                        | 24,933                         | 43,333                           | 43,333                       | -                             |
| Fines and Forfeitures                  | 123,199   | 131,794                       | 131,794                        | 117,431                          | 117,431                      | -                             |
| Sales Income                           | 14  | -                             | -                              | -                                | -                            | -                             |
| Transfer to General Fund               | (65,151)  | (66,381)                      | (66,381)                       | (50,262)                         | (50,262)                     | -                             |
| <b>Total Other Funds</b>               | <b>\$5,108,235</b>  | <b>\$5,557,314</b>            | <b>\$5,557,314</b>             | <b>\$6,176,047</b>               | <b>\$6,176,047</b>           | -                             |

\_\_\_\_ Agency Request  
2015-17 Biennium

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\_\_\_\_ Legislatively Adopted  
Detail of LF, OF, and FF Revenues - BPR012



## BUDGET NARRATIVE

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# BUDGET NARRATIVE

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## **Program Description**

The Real Estate Agency has only one budget unit.

## **Essential Packages**

### **010 Vacancy Factor and Non-PICS Personal Service**

#### **Package Description**

This package includes general inflation of 3% on non-PICS items of temporaries, overtime, shift differentials, and unemployment compensation. The Agency's vacancy factor is \$66,892. Mass transit taxes are \$601. This package increases Personal Services by \$84,934, which is all Other Funds.

#### **2017-19 Fiscal Impact**

No impact.

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
 Budget: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Real Estate Agency  
 Cross Reference Number: 91900-050-00-00-00000

| Description                    | General Fund | Lottery Funds | Other Funds       | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds         |
|--------------------------------|--------------|---------------|-------------------|---------------|------------------------|--------------------------|-------------------|
| <b>Personal Services</b>       |              |               |                   |               |                        |                          |                   |
| Temporary Appointments         | -            | -             | 435               | -             | -                      | -                        | 435               |
| Overtime Payments              | -            | -             | 80                | -             | -                      | -                        | 80                |
| All Other Differential         | -            | -             | 45                | -             | -                      | -                        | 45                |
| Public Employees' Retire Cont  | -            | -             | 20                | -             | -                      | -                        | 20                |
| Pension Obligation Bond        | -            | -             | 20,808            | -             | -                      | -                        | 20,808            |
| Social Security Taxes          | -            | -             | 42                | -             | -                      | -                        | 42                |
| Unemployment Assessments       | -            | -             | 11                | -             | -                      | -                        | 11                |
| Mass Transit Tax               | -            | -             | 601               | -             | -                      | -                        | 601               |
| Vacancy Savings                | -            | -             | 62,892            | -             | -                      | -                        | 62,892            |
| <b>Total Personal Services</b> | <b>-</b>     | <b>-</b>      | <b>\$84,934</b>   | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>\$84,934</b>   |
| <b>Total Expenditures</b>      |              |               |                   |               |                        |                          |                   |
| Total Expenditures             | -            | -             | 84,934            | -             | -                      | -                        | 84,934            |
| <b>Total Expenditures</b>      | <b>-</b>     | <b>-</b>      | <b>\$84,934</b>   | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>\$84,934</b>   |
| <b>Ending Balance</b>          |              |               |                   |               |                        |                          |                   |
| Ending Balance                 | -            | -             | (84,934)          | -             | -                      | -                        | (84,934)          |
| <b>Total Ending Balance</b>    | <b>-</b>     | <b>-</b>      | <b>(\$84,934)</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>(\$84,934)</b> |

Agency Request  
 2015-17 Biennium

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Legislatively Adopted  
 Essential and Policy Package Fiscal Impact Summary - BPR013

# BUDGET NARRATIVE

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## **031 Standard Inflation and State Government Service Charge**

### **Package Description**

This essential package reflects the projected inflation increases in goods and services, the published changes in pricing of government service charges, and above standard inflation totals.

The cost of goods and services increased by \$113,389. This is based on the biennial general inflation factor which is applied to most Services and Supplies and non-PICS Personal Services costs for 2013-15 of 3%. The inflation factor for Professional Services accounts was 3.3%, Attorney General was 19.2%, and rent for DAS-owned buildings was 3%.

### **2017-19 Fiscal Impact**

No impact.

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
Pkg: 031 - Standard Inflation

Cross Reference Name: Real Estate Agency  
Cross Reference Number: 91900-050-00-00-00000

| Description                          | General Fund | Lottery Funds | Other Funds     | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds       |
|--------------------------------------|--------------|---------------|-----------------|---------------|------------------------|--------------------------|-----------------|
| <b>Services &amp; Supplies</b>       |              |               |                 |               |                        |                          |                 |
| Instate Travel                       | -            | -             | 2,419           | -             | -                      | -                        | 2,419           |
| Out of State Travel                  | -            | -             | 570             | -             | -                      | -                        | 570             |
| Employee Training                    | -            | -             | 904             | -             | -                      | -                        | 904             |
| Office Expenses                      | -            | -             | 5,760           | -             | -                      | -                        | 5,760           |
| Telecommunications                   | -            | -             | 804             | -             | -                      | -                        | 804             |
| State Gov. Service Charges           | -            | -             | 12,315          | -             | -                      | -                        | 12,315          |
| Data Processing                      | -            | -             | 1,222           | -             | -                      | -                        | 1,222           |
| Publicity and Publications           | -            | -             | 3,594           | -             | -                      | -                        | 3,594           |
| Professional Services                | -            | -             | 5,012           | -             | -                      | -                        | 5,012           |
| IT Professional Services             | -            | -             | 2,176           | -             | -                      | -                        | 2,176           |
| Attorney General                     | -            | -             | 30,667          | -             | -                      | -                        | 30,667          |
| Employee Recruitment and Develop     | -            | -             | 200             | -             | -                      | -                        | 200             |
| Dues and Subscriptions               | -            | -             | 259             | -             | -                      | -                        | 259             |
| Facilities Rental and Taxes          | -            | -             | 12,525          | -             | -                      | -                        | 12,525          |
| Facilities Maintenance               | -            | -             | 122             | -             | -                      | -                        | 122             |
| Agency Program Related S and S       | -            | -             | 1,118           | -             | -                      | -                        | 1,118           |
| Other Services and Supplies          | -            | -             | 3,764           | -             | -                      | -                        | 3,764           |
| Expendable Prop 250 - 5000           | -            | -             | 789             | -             | -                      | -                        | 789             |
| IT Expendable Property               | -            | -             | 4,410           | -             | -                      | -                        | 4,410           |
| <b>Total Services &amp; Supplies</b> | -            | -             | <b>\$88,630</b> | -             | -                      | -                        | <b>\$88,630</b> |

\_\_\_\_ Agency Request  
2015-17 Biennium

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\_\_\_\_ Legislatively Adopted  
Essential and Policy Package Fiscal Impact Summary - BPR013

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
Pkg: 031 - Standard Inflation

Cross Reference Name: Real Estate Agency  
Cross Reference Number: 91900-050-00-00-00000

| <i>Description</i>          | General Fund | Lottery Funds | Other Funds       | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds         |
|-----------------------------|--------------|---------------|-------------------|---------------|------------------------|--------------------------|-------------------|
| <b>Total Expenditures</b>   |              |               |                   |               |                        |                          |                   |
| Total Expenditures          | -            | -             | 88,630            | -             | -                      | -                        | 88,630            |
| <b>Total Expenditures</b>   | -            | -             | <b>\$88,630</b>   | -             | -                      | -                        | <b>\$88,630</b>   |
| <b>Ending Balance</b>       |              |               |                   |               |                        |                          |                   |
| Ending Balance              | -            | -             | (88,630)          | -             | -                      | -                        | (88,630)          |
| <b>Total Ending Balance</b> | -            | -             | <b>(\$88,630)</b> | -             | -                      | -                        | <b>(\$88,630)</b> |

# BUDGET NARRATIVE

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## **090 Analyst Adjustments**

### **Package Description**

This policy package reflects the reduction of one Information Services Specialist 3 position (a total reduction of 1 position and .75 FTE). The corresponding dollar reduction in Personal Services is \$135,000. Furthermore, the Agency's Services & Supplies budget was reduced by a total of \$365,000 to align the Agency's expenditure limitation with actual spending projections.

### **2017-19 Fiscal Impact**

No impact.

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Real Estate Agency  
Cross Reference Number: 91900-050-00-00-00000

| <i>Description</i>                   | General Fund | Lottery Funds | Other Funds        | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds          |
|--------------------------------------|--------------|---------------|--------------------|---------------|------------------------|--------------------------|--------------------|
| <b>Personal Services</b>             |              |               |                    |               |                        |                          |                    |
| Class/Unclass Sal. and Per Diem      | -            | -             | (43,656)           | -             | -                      | -                        | (43,656)           |
| Empl. Rel. Bd. Assessments           | -            | -             | (44)               | -             | -                      | -                        | (44)               |
| Public Employees' Retire Cont        | -            | -             | (6,893)            | -             | -                      | -                        | (6,893)            |
| Social Security Taxes                | -            | -             | (3,340)            | -             | -                      | -                        | (3,340)            |
| Worker's Comp. Assess. (WCD)         | -            | -             | (69)               | -             | -                      | -                        | (69)               |
| Flexible Benefits                    | -            | -             | (30,528)           | -             | -                      | -                        | (30,528)           |
| Reconciliation Adjustment            | -            | -             | (50,470)           | -             | -                      | -                        | (50,470)           |
| <b>Total Personal Services</b>       | -            | -             | <b>(\$135,000)</b> | -             | -                      | -                        | <b>(\$135,000)</b> |
| <b>Services &amp; Supplies</b>       |              |               |                    |               |                        |                          |                    |
| Office Expenses                      | -            | -             | (100,000)          | -             | -                      | -                        | (100,000)          |
| Publicity and Publications           | -            | -             | (70,000)           | -             | -                      | -                        | (70,000)           |
| Professional Services                | -            | -             | (100,000)          | -             | -                      | -                        | (100,000)          |
| IT Expendable Property               | -            | -             | (75,000)           | -             | -                      | -                        | (75,000)           |
| <b>Total Services &amp; Supplies</b> | -            | -             | <b>(\$345,000)</b> | -             | -                      | -                        | <b>(\$345,000)</b> |
| <b>Total Expenditures</b>            |              |               |                    |               |                        |                          |                    |
| Total Expenditures                   | -            | -             | (480,000)          | -             | -                      | -                        | (480,000)          |
| <b>Total Expenditures</b>            | -            | -             | <b>(\$480,000)</b> | -             | -                      | -                        | <b>(\$480,000)</b> |
| <b>Ending Balance</b>                |              |               |                    |               |                        |                          |                    |
| Ending Balance                       | -            | -             | 480,000            | -             | -                      | -                        | 480,000            |
| <b>Total Ending Balance</b>          | -            | -             | <b>\$480,000</b>   | -             | -                      | -                        | <b>\$480,000</b>   |

Agency Request  
2015-17 Biennium

Governor's Budget  
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Legislatively Adopted  
Essential and Policy Package Fiscal Impact Summary - BPR013



# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Real Estate Agency  
Cross Reference Number: 91900-050-00-00-00000

| <i>Description</i>     | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds     |
|------------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|---------------|
| Total Positions        |              |               |             |               |                        |                          |               |
| Total Positions        |              |               |             |               |                        |                          | (1)           |
| <b>Total Positions</b> | -            | -             | -           | -             | -                      | -                        | <b>(1)</b>    |
| Total FTE              |              |               |             |               |                        |                          |               |
| Total FTE              |              |               |             |               |                        |                          | (0.75)        |
| <b>Total FTE</b>       | -            | -             | -           | -             | -                      | -                        | <b>(0.75)</b> |

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2015-17 Biennium

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Essential and Policy Package Fiscal Impact Summary - BPR013

# BUDGET NARRATIVE

12/22/14 REPORT NO.: PPDFFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY: 91900 REAL ESTATE AGENCY  
 SUMMARY XREP: 050-00-00 Real Estate Agency

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

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 2015-17  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 090 - Analyst Adjustments

| POSITION                                      | POS |      |        |      |          | GF      | OF      | FF      | LF      | AF      |
|---|-----|------|--------|------|----------|---------|---------|---------|---------|---------|
| NUMBER CLASS COMP CLASS NAME                  | CNT | FTE  | MOS    | STEP | RATE     | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE |
| 0005020 AR C1483 IA INFO SYSTEMS SPECIALIST 3 | 1-  | .50- | 12.00- | 02   | 3,638.00 |         | 43,656- |         |         | 43,656- |
|   |     |      |        |      |          |         | 40,874- |         |         | 40,874- |
|   |     |      |        |      |          |         |         |         |         |         |
| TOTAL PICS SALARY                             |     |      |        |      |          |         | 43,656- |         |         | 43,656- |
| TOTAL PICS OPE                                |     |      |        |      |          |         | 40,874- |         |         | 40,874- |
|   |     |      |        |      |          |         |         |         |         |         |
| TOTAL PICS PERSONAL SERVICES =                | 1-  | .50- | 12.00- |      |          |         | 84,530- |         |         | 84,530- |

# BUDGET NARRATIVE

## DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Real Estate Agency  
2015-17 Biennium

Agency Number: 91900  
Cross Reference Number: 91900-000-00-00-00000

| Source                   | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved Budget | 2015-17 Agency<br>Request Budget | 2015-17 Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|--------------------------|--------------------|-------------------------------|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| <b>Other Funds</b>       |                    |                               |                                |                                  |                              |                               |
| Business Lic and Fees    | 4,956,297          | 5,466,968                     | 5,466,968                      | 6,065,545                        | 6,065,545                    | -                             |
| Charges for Services     | 93,876             | 24,933                        | 24,933                         | 43,333                           | 43,333                       | -                             |
| Fines and Forfeitures    | 123,199            | 131,794                       | 131,794                        | 117,431                          | 117,431                      | -                             |
| Sales Income             | 14                 | -                             | -                              | -                                | -                            | -                             |
| Transfer to General Fund | (65,151)           | (66,381)                      | (66,381)                       | (50,262)                         | (50,262)                     | -                             |
| <b>Total Other Funds</b> | <b>\$5,108,235</b> | <b>\$5,557,314</b>            | <b>\$5,557,314</b>             | <b>\$6,176,047</b>               | <b>\$6,176,047</b>           | -                             |

\_\_\_\_ Agency Request  
2015-17 Biennium

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Detail of LF, OF, and FF Revenues - BPR012

# BUDGET NARRATIVE

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## AFFIRMATIVE ACTION PLAN FOR THE REAL ESTATE AGENCY

### Background

The Real Estate Agency (REA) is a small agency (29.00 FTE) of 29 employees primarily made up of professional and managerial personnel specializing in the field of real estate. Of the 29 positions, 22 are at salary range 21 or above. Only seven positions can be classified as administrative specialist/support at salary ranges 17 - 19. So far during the 2013-15 biennium, we have had two vacancies due to individuals seeking other employment.

### Analysis

Upper Management (SR 31+) Two of the five upper management positions are female; there are no minority employees and no disabled employees.

Middle Management (SR 28-30) Four middle management positions are female. There are no minorities or disabled employees.

Professional (SR 21-27) Eight of the Thirteen in this group are female. There currently are no minority employees and no disabled employees. This group provides one of the best opportunities for the Agency to employ those from protected classes. However, the recruitment pool containing those from protected classes with real estate, escrow, or investigative backgrounds is relatively small.

Administrative Specialist/Support (SR 15-19) Five of six (100%) are female. This group has been relatively stable over the past few years. There is one minority employee in this group.

# BUDGET NARRATIVE

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## LONG RANGE STRATEGIES & GOALS

The Agency continues to strive for parity in needed areas. However, one problem that tends to make reaching parity difficult is that REA attempts to hire Professional, Middle Management and Upper Management with a real estate background. Unfortunately, the real estate industry is not reflective of the parity goals as set out in our AA Analysis or AA Reports.

The Agency has and will continue to take steps to network with representatives of organizations advocating for people of color and the disabled prior to position openings. When possible, the Agency has and will continue to work closely with real estate training institution recruiters to contact and encourage more minority participation as students.

When and where possible, without discrimination, the Agency will continue to assist its employees in upward mobility through retention and career development efforts.

The Agency continues to make the work environment hospitable to persons of diverse background when they are added to its work place. In an effort to achieve this goal, the Agency will make planned efforts to obtain diversity training for staff from available sources.

# BUDGET NARRATIVE

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## DEVELOPMENT & IMPLEMENTATION OF PROGRAMS

- Training The Agency has provided training to the IT staff that is necessary for maintaining the agency operating system, information security and reporting requirements. The Agency has also provided customer service training to the administrative staff to assist in dealing with the demands of public information. Financial Investigators are involved in training at the Department of Justice on an ongoing basis, and will also attend Association of Real Estate License Law Officials (ARELLO) Real Estate Investigator Training this biennium. The Agency will develop training and developmental plans for its employees.
- Employee The Agency continues to upgrade system furniture to meet the ergonomic needs of staff on an as-needed basis.
- (ADA) Dept. of Administrative Services (DAS) has modified employee and public restrooms to meet new ADA standards. When DAS modified employee/public restrooms to meet the ADA standards, it installed signs with raised Braille lettering to assist the visually impaired and fire alarm systems to warn those with disabilities.
- Public Accommodation The Agency has TTY services available for those with hearing impairment, should the public need the service when contacting the Agency. We also provide language interpreters when needed. Handicapped parking, automatic door opener at one entrance and accessible restrooms are available for all visitors to the Agency needing such services. Customer service staff-members are on hand to help licensees conduct business in eLicense. For walk-in customers, staff can walk through the various online application processes if requested.
- Special arrangements have also been provided for those with visual impairment upon request. The Agency's examination vendor can accommodate those with special needs.
- In general we believe the Real Estate Agency has met the needs and the new requirements of the disabled under the ADA and continues to work toward parity in minority, disabled and female hiring.

# BUDGET NARRATIVE

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# BUDGET NARRATIVE

## *Real Estate Agency*

Summary Cross Reference Listing and Packages  
2015-17 Biennium

Agency Number: 91900

BAM Analyst: Miller, Travis

Budget Coordinator: Kleiner, Erica - (503)378-4009

| <i>Cross Reference Number</i> | <i>Cross Reference Description</i> | <i>Package Number</i> | <i>Priority</i> | <i>Package Description</i>         | <i>Package Group</i> |
|-------------------------------|------------------------------------|-----------------------|-----------------|------------------------------------|----------------------|
| 050-00-00-00000               | Real Estate Agency                 | 010                   | 0               | Non-PICS Psnl Svc / Vacancy Factor | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 021                   | 0               | Phase-in                           | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 022                   | 0               | Phase-out Pgm & One-time Costs     | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 031                   | 0               | Standard Inflation                 | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 032                   | 0               | Above Standard Inflation           | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 033                   | 0               | Exceptional Inflation              | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 081                   | 0               | September 2014 E-Board             | Policy Packages      |
| 050-00-00-00000               | Real Estate Agency                 | 090                   | 0               | Analyst Adjustments                | Policy Packages      |



# BUDGET NARRATIVE

## Real Estate Agency

Policy Package List by Priority  
2015-17 Biennium

Agency Number: 91900

BAM Analyst: Miller, Travis

Budget Coordinator: Kleiner, Erica - (503)378-4009

| <i>Priority</i> | <i>Policy Pkg Number</i> | <i>Policy Pkg Description</i> | <i>Summary Cross Reference Number</i> | <i>Cross Reference Description</i> |
|-----------------|--------------------------|-------------------------------|---------------------------------------|------------------------------------|
| 0               | 081                      | September 2014 E-Board        | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 090                      | Analyst Adjustments           | 050-00-00-00000                       | Real Estate Agency                 |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 91900-000-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                              | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved<br>Budget | 2015-17 Agency<br>Request Budget | 2015-17<br>Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|--|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>BEGINNING BALANCE</b>                 |                    |                               |                                   |                                  |                                 |                               |
| <b>0025 Beginning Balance</b>            |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 3,068,528          | 1,872,473                     | 1,872,473                         | 1,461,966                        | 1,461,966                       | -                             |
| <b>0030 Beginning Balance Adjustment</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | -                  | 612,164                       | 612,164                           | -                                | -                               | -                             |
| <b>BEGINNING BALANCE</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 3,068,528          | 2,484,637                     | 2,484,637                         | 1,461,966                        | 1,461,966                       | -                             |
| <b>TOTAL BEGINNING BALANCE</b>           | <b>\$3,068,528</b> | <b>\$2,484,637</b>            | <b>\$2,484,637</b>                | <b>\$1,461,966</b>               | <b>\$1,461,966</b>              | <b>-</b>                      |
| <b>REVENUE CATEGORIES</b>                |                    |                               |                                   |                                  |                                 |                               |
| <b>LICENSES AND FEES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| <b>0205 Business Lic and Fees</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 4,956,297          | 5,466,968                     | 5,466,968                         | 6,065,545                        | 6,065,545                       | -                             |
| <b>CHARGES FOR SERVICES</b>              |                    |                               |                                   |                                  |                                 |                               |
| <b>0410 Charges for Services</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 93,876             | 24,933                        | 24,933                            | 43,333                           | 43,333                          | -                             |
| <b>FINES, RENTS AND ROYALTIES</b>        |                    |                               |                                   |                                  |                                 |                               |
| <b>0505 Fines and Forfeitures</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 58,048             | 65,413                        | 65,413                            | 67,169                           | 67,169                          | -                             |
| 8800 General Fund Revenue                | 65,151             | 66,381                        | 66,381                            | 50,262                           | 50,262                          | -                             |
| All Funds                                | 123,199            | 131,794                       | 131,794                           | 117,431                          | 117,431                         | -                             |
| <b>SALES INCOME</b>                      |                    |                               |                                   |                                  |                                 |                               |
| <b>0705 Sales Income</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 14                 | -                             | -                                 | -                                | -                               | -                             |

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BDV103A

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 91900-000-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                                 | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved<br>Budget | 2015-17 Agency<br>Request Budget | 2015-17<br>Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>REVENUE CATEGORIES</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 5,108,235          | 5,557,314                     | 5,557,314                         | 6,176,047                        | 6,176,047                       | -                             |
| 8800 General Fund Revenue                   | 65,151             | 66,381                        | 66,381                            | 50,262                           | 50,262                          | -                             |
| <b>TOTAL REVENUE CATEGORIES</b>             | <b>\$5,173,386</b> | <b>\$5,623,695</b>            | <b>\$5,623,695</b>                | <b>\$6,226,309</b>               | <b>\$6,226,309</b>              | -                             |
| <b>TRANSFERS OUT</b>                        |                    |                               |                                   |                                  |                                 |                               |
| 2060 Transfer to General Fund               |                    |                               |                                   |                                  |                                 |                               |
| 8800 General Fund Revenue                   | (65,151)           | (66,381)                      | (66,381)                          | (50,262)                         | (50,262)                        | -                             |
| <b>AVAILABLE REVENUES</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 8,176,763          | 8,041,951                     | 8,041,951                         | 7,638,013                        | 7,638,013                       | -                             |
| <b>TOTAL AVAILABLE REVENUES</b>             | <b>\$8,176,763</b> | <b>\$8,041,951</b>            | <b>\$8,041,951</b>                | <b>\$7,638,013</b>               | <b>\$7,638,013</b>              | -                             |
| <b>EXPENDITURES</b>                         |                    |                               |                                   |                                  |                                 |                               |
| <b>PERSONAL SERVICES</b>                    |                    |                               |                                   |                                  |                                 |                               |
| <b>SALARIES &amp; WAGES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| <b>3110 Class/Unclass Sal. and Per Diem</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 2,770,731          | 3,318,576                     | 3,467,225                         | 3,586,980                        | 3,524,256                       | -                             |
| <b>3160 Temporary Appointments</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 67,383             | 14,500                        | 14,500                            | 14,935                           | 14,935                          | -                             |
| <b>3170 Overtime Payments</b>               |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 20,795             | 2,682                         | 2,682                             | 2,762                            | 2,762                           | -                             |
| <b>3190 All Other Differential</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 19,004             | 1,493                         | 1,493                             | 1,538                            | 1,538                           | -                             |
| <b>SALARIES &amp; WAGES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 2,877,913          | 3,337,251                     | 3,485,900                         | 3,606,215                        | 3,543,491                       | -                             |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 91900-000-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                               | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved<br>Budget | 2015-17 Agency<br>Request Budget | 2015-17<br>Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>TOTAL SALARIES &amp; WAGES</b>         | <b>\$2,877,913</b> | <b>\$3,337,251</b>            | <b>\$3,485,900</b>                | <b>\$3,606,215</b>               | <b>\$3,543,491</b>              | -                             |
| <b>OTHER PAYROLL EXPENSES</b>             |                    |                               |                                   |                                  |                                 |                               |
| <b>3210 Empl. Rel. Bd. Assessments</b>    |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 954                | 1,200                         | 1,200                             | 1,320                            | 1,276                           | -                             |
| <b>3220 Public Employees' Retire Cont</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 406,814            | 486,498                       | 507,862                           | 566,038                          | 556,134                         | -                             |
| <b>3221 Pension Obligation Bond</b>       |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 171,983            | 199,717                       | 201,455                           | 222,263                          | 222,263                         | -                             |
| <b>3230 Social Security Taxes</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 214,628            | 253,520                       | 264,892                           | 274,887                          | 270,088                         | -                             |
| <b>3240 Unemployment Assessments</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 9,281              | 375                           | 375                               | 386                              | 386                             | -                             |
| <b>3250 Worker's Comp. Assess. (WCD)</b>  |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 1,351              | 1,770                         | 1,770                             | 2,070                            | 2,001                           | -                             |
| <b>3260 Mass Transit Tax</b>              |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 17,259             | 20,013                        | 21,033                            | 21,634                           | 21,634                          | -                             |
| <b>3270 Flexible Benefits</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 798,826            | 915,840                       | 929,196                           | 915,840                          | 885,312                         | -                             |
| <b>OTHER PAYROLL EXPENSES</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 1,621,096          | 1,878,933                     | 1,927,783                         | 2,004,438                        | 1,959,094                       | -                             |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>       | <b>\$1,621,096</b> | <b>\$1,878,933</b>            | <b>\$1,927,783</b>                | <b>\$2,004,438</b>               | <b>\$1,959,094</b>              | -                             |
| <b>P.S. BUDGET ADJUSTMENTS</b>            |                    |                               |                                   |                                  |                                 |                               |
| <b>3455 Vacancy Savings</b>               |                    |                               |                                   |                                  |                                 |                               |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

**Budget Support - Detail Revenues and Expenditures**

**Cross Reference Number: 91900-000-00-00-00000**

**2015-17 Biennium**

**Real Estate Agency**

| Description                           | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved<br>Budget | 2015-17 Agency<br>Request Budget | 2015-17<br>Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|---------------------------------------|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| 3400 Other Funds Ltd                  | -                  | (107,921)                     | (107,921)                         | (45,029)                         | (45,029)                        | -                             |
| <b>3465 Reconciliation Adjustment</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | 141,527                       | 141,527                           | -                                | (26,932)                        | -                             |
| <b>3470 Undistributed (P.S.)</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | (25,920)                      | -                                 | -                                | -                               | -                             |
| <b>3991 PERS Policy Adjustment</b>    |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | (119,177)                     | (119,177)                         | -                                | -                               | -                             |
| <b>P.S. BUDGET ADJUSTMENTS</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | (111,491)                     | (85,571)                          | (45,029)                         | (71,961)                        | -                             |
| <b>TOTAL P.S. BUDGET ADJUSTMENTS</b>  | <b>-</b>           | <b>(\$111,491)</b>            | <b>(\$85,571)</b>                 | <b>(\$45,029)</b>                | <b>(\$71,961)</b>               | <b>-</b>                      |
| <b>PERSONAL SERVICES</b>              |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 4,499,009          | 5,104,693                     | 5,328,112                         | 5,565,624                        | 5,430,624                       | -                             |
| <b>TOTAL PERSONAL SERVICES</b>        | <b>\$4,499,009</b> | <b>\$5,104,693</b>            | <b>\$5,328,112</b>                | <b>\$5,565,624</b>               | <b>\$5,430,624</b>              | <b>-</b>                      |
| <b>SERVICES &amp; SUPPLIES</b>        |                    |                               |                                   |                                  |                                 |                               |
| <b>4100 Instate Travel</b>            |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 59,312             | 80,644                        | 80,644                            | 83,063                           | 83,063                          | -                             |
| <b>4125 Out of State Travel</b>       |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 34,084             | 18,985                        | 18,985                            | 19,555                           | 19,555                          | -                             |
| <b>4150 Employee Training</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 38,365             | 30,119                        | 30,119                            | 34,368                           | 34,368                          | -                             |
| <b>4175 Office Expenses</b>           |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 74,811             | 201,869                       | 191,990                           | 209,191                          | 109,191                         | -                             |
| <b>4200 Telecommunications</b>        |                    |                               |                                   |                                  |                                 |                               |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

**Budget Support - Detail Revenues and Expenditures**

**Cross Reference Number: 91900-000-00-00-00000**

**2015-17 Biennium**

**Real Estate Agency**

| <i>Description</i>                           | <i>2011-13 Actuals</i> | <i>2013-15 Leg<br/>Adopted Budget</i> | <i>2013-15 Leg<br/>Approved<br/>Budget</i> | <i>2015-17 Agency<br/>Request Budget</i> | <i>2015-17<br/>Governor's<br/>Budget</i> | <i>2015-17 Leg<br/>Adopted Budget</i> |
|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| 3400 Other Funds Ltd                         | 78,097                 | 26,814                                | 26,814                                     | 27,618                                   | 27,618                                   | -                                     |
| <b>4225 State Gov. Service Charges</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 202,926                | 203,240                               | 203,240                                    | 180,018                                  | 167,847                                  | -                                     |
| <b>4250 Data Processing</b>                  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 78,212                 | 40,732                                | 40,732                                     | 41,954                                   | 41,954                                   | -                                     |
| <b>4275 Publicity and Publications</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 10,371                 | 119,804                               | 119,804                                    | 123,398                                  | 53,398                                   | -                                     |
| <b>4300 Professional Services</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 74,297                 | 167,080                               | 167,080                                    | 172,092                                  | 72,092                                   | -                                     |
| <b>4315 IT Professional Services</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 431,886                | 72,545                                | 72,545                                     | 74,721                                   | 74,721                                   | -                                     |
| <b>4325 Attorney General</b>                 |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 97,624                 | 225,288                               | 225,288                                    | 268,543                                  | 255,955                                  | -                                     |
| <b>4375 Employee Recruitment and Develop</b> |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 225                    | 6,667                                 | 6,667                                      | 7,198                                    | 7,198                                    | -                                     |
| <b>4400 Dues and Subscriptions</b>           |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 7,028                  | 8,636                                 | 8,636                                      | 8,895                                    | 8,895                                    | -                                     |
| <b>4425 Facilities Rental and Taxes</b>      |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 361,996                | 416,932                               | 416,932                                    | 429,457                                  | 429,457                                  | -                                     |
| <b>4475 Facilities Maintenance</b>           |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 576                    | 4,077                                 | 4,077                                      | 4,199                                    | 4,199                                    | -                                     |
| <b>4575 Agency Program Related S and S</b>   |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 20,101                 | 37,258                                | 37,258                                     | 38,376                                   | 38,376                                   | -                                     |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

**Budget Support - Detail Revenues and Expenditures**

**Cross Reference Number: 91900-000-00-00-00000**

**2015-17 Biennium**

**Real Estate Agency**

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|---|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>4650 Other Services and Supplies</b> |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | 95,077                 | 125,450                               | 125,450                                    | 161,805                                  | 161,805                                  | -                                     |
| <b>4675 Undistributed (S.S.)</b>        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | -                      | (10,138)                              | -  | -  | -  | -                                     |
| <b>4700 Expendable Prop 250 - 5000</b>  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | 4,323                  | 26,290                                | 26,290                                     | 27,079                                   | 27,079                                   | -                                     |
| <b>4715 IT Expendable Property</b>      |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | 30,370                 | 146,994                               | 146,994                                    | 151,404                                  | 76,404                                   | -                                     |
| <b>SERVICES &amp; SUPPLIES</b>          |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | 1,699,681              | 1,949,286                             | 1,949,545                                  | 2,062,934                                | 1,693,175                                | -                                     |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>    | <b>\$1,699,681</b>     | <b>\$1,949,286</b>                    | <b>\$1,949,545</b>                         | <b>\$2,062,934</b>                       | <b>\$1,693,175</b>                       | <b>-</b>                              |
| <b>EXPENDITURES</b>                     |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | 6,198,690              | 7,053,979                             | 7,277,657                                  | 7,628,558                                | 7,123,799                                | -                                     |
| <b>TOTAL EXPENDITURES</b>               | <b>\$6,198,690</b>     | <b>\$7,053,979</b>                    | <b>\$7,277,657</b>                         | <b>\$7,628,558</b>                       | <b>\$7,123,799</b>                       | <b>-</b>                              |
| <b>ENDING BALANCE</b>                   |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                    | 1,978,073              | 987,972                               | 764,294                                    | 9,455                                    | 514,214                                  | -                                     |
| <b>TOTAL ENDING BALANCE</b>             | <b>\$1,978,073</b>     | <b>\$987,972</b>                      | <b>\$764,294</b>                           | <b>\$9,455</b>                           | <b>\$514,214</b>                         | <b>-</b>                              |
| <b>AUTHORIZED POSITIONS</b>             |                        |                                       |  |  |  |                                       |
| 8150 Class/Unclass Positions            | 31                     | 30                                    | 30   | 30                                       | 29                                       | -                                     |
| <b>TOTAL AUTHORIZED POSITIONS</b>       | <b>31</b>              | <b>30</b>                             | <b>30</b>                                  | <b>30</b>                                | <b>29</b>                                | <b>-</b>                              |
| <b>AUTHORIZED FTE</b>                   |                        |                                       |  |  |  |                                       |
| 8250 Class/Unclass FTE Positions        | 30.25                  | 30.00                                 | 30.00                                      | 29.75                                    | 29.00                                    | -                                     |
| 8280 FTE Reconciliation                 | -                      | -                                     | (0.25)                                     | -  | -  | -                                     |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures

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Real Estate Agency

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|-----------------------------|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>TOTAL AUTHORIZED FTE</b> | <b>30.25</b>           | <b>30.00</b>                          | <b>29.75</b>                               | <b>29.75</b>                             | <b>29.00</b>                             | <b>-</b>                              |



# BUDGET NARRATIVE

**Real Estate Agency**

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Cross Reference Number: 91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                              | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved<br>Budget | 2015-17 Agency<br>Request Budget | 2015-17<br>Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|--|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>BEGINNING BALANCE</b>                 |                    |                               |                                   |                                  |                                 |                               |
| <b>0025 Beginning Balance</b>            |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 3,068,528          | 1,872,473                     | 1,872,473                         | 1,461,966                        | 1,461,966                       | -                             |
| <b>0030 Beginning Balance Adjustment</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | -                  | 612,164                       | 612,164                           | -                                | -                               | -                             |
| <b>BEGINNING BALANCE</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 3,068,528          | 2,484,637                     | 2,484,637                         | 1,461,966                        | 1,461,966                       | -                             |
| <b>TOTAL BEGINNING BALANCE</b>           | <b>\$3,068,528</b> | <b>\$2,484,637</b>            | <b>\$2,484,637</b>                | <b>\$1,461,966</b>               | <b>\$1,461,966</b>              | <b>-</b>                      |
| <b>REVENUE CATEGORIES</b>                |                    |                               |                                   |                                  |                                 |                               |
| <b>LICENSES AND FEES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| <b>0205 Business Lic and Fees</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 4,956,297          | 5,466,968                     | 5,466,968                         | 6,065,545                        | 6,065,545                       | -                             |
| <b>CHARGES FOR SERVICES</b>              |                    |                               |                                   |                                  |                                 |                               |
| <b>0410 Charges for Services</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 93,876             | 24,933                        | 24,933                            | 43,333                           | 43,333                          | -                             |
| <b>FINES, RENTS AND ROYALTIES</b>        |                    |                               |                                   |                                  |                                 |                               |
| <b>0505 Fines and Forfeitures</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 58,048             | 65,413                        | 65,413                            | 67,169                           | 67,169                          | -                             |
| 8800 General Fund Revenue                | 65,151             | 66,381                        | 66,381                            | 50,262                           | 50,262                          | -                             |
| All Funds                                | 123,199            | 131,794                       | 131,794                           | 117,431                          | 117,431                         | -                             |
| <b>SALES INCOME</b>                      |                    |                               |                                   |                                  |                                 |                               |
| <b>0705 Sales Income</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                     | 14                 | -                             | -                                 | -                                | -                               | -                             |

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|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>REVENUE CATEGORIES</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 5,108,235          | 5,557,314                     | 5,557,314                         | 6,176,047                        | 6,176,047                       | -                             |
| 8800 General Fund Revenue                   | 65,151             | 66,381                        | 66,381                            | 50,262                           | 50,262                          | -                             |
| <b>TOTAL REVENUE CATEGORIES</b>             | <b>\$5,173,386</b> | <b>\$5,623,695</b>            | <b>\$5,623,695</b>                | <b>\$6,226,309</b>               | <b>\$6,226,309</b>              | -                             |
| <b>TRANSFERS OUT</b>                        |                    |                               |                                   |                                  |                                 |                               |
| <b>2060 Transfer to General Fund</b>        |                    |                               |                                   |                                  |                                 |                               |
| 8800 General Fund Revenue                   | (65,151)           | (66,381)                      | (66,381)                          | (50,262)                         | (50,262)                        | -                             |
| <b>AVAILABLE REVENUES</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 8,176,763          | 8,041,951                     | 8,041,951                         | 7,638,013                        | 7,638,013                       | -                             |
| <b>TOTAL AVAILABLE REVENUES</b>             | <b>\$8,176,763</b> | <b>\$8,041,951</b>            | <b>\$8,041,951</b>                | <b>\$7,638,013</b>               | <b>\$7,638,013</b>              | -                             |
| <b>EXPENDITURES</b>                         |                    |                               |                                   |                                  |                                 |                               |
| <b>PERSONAL SERVICES</b>                    |                    |                               |                                   |                                  |                                 |                               |
| <b>SALARIES &amp; WAGES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| <b>3110 Class/Unclass Sal. and Per Diem</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 2,770,731          | 3,318,576                     | 3,467,225                         | 3,586,980                        | 3,524,256                       | -                             |
| <b>3160 Temporary Appointments</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 67,383             | 14,500                        | 14,500                            | 14,935                           | 14,935                          | -                             |
| <b>3170 Overtime Payments</b>               |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 20,795             | 2,682                         | 2,682                             | 2,762                            | 2,762                           | -                             |
| <b>3190 All Other Differential</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 19,004             | 1,493                         | 1,493                             | 1,538                            | 1,538                           | -                             |
| <b>SALARIES &amp; WAGES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 2,877,913          | 3,337,251                     | 3,485,900                         | 3,606,215                        | 3,543,491                       | -                             |

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|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>TOTAL SALARIES &amp; WAGES</b>         | <b>\$2,877,913</b> | <b>\$3,337,251</b>            | <b>\$3,485,900</b>                | <b>\$3,606,215</b>               | <b>\$3,543,491</b>              | -                             |
| <b>OTHER PAYROLL EXPENSES</b>             |                    |                               |                                   |                                  |                                 |                               |
| <b>3210 Empl. Rel. Bd. Assessments</b>    |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 954                | 1,200                         | 1,200                             | 1,320                            | 1,276                           | -                             |
| <b>3220 Public Employees' Retire Cont</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 406,814            | 486,498                       | 507,862                           | 566,038                          | 556,134                         | -                             |
| <b>3221 Pension Obligation Bond</b>       |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 171,983            | 199,717                       | 201,455                           | 222,263                          | 222,263                         | -                             |
| <b>3230 Social Security Taxes</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 214,628            | 253,520                       | 264,892                           | 274,887                          | 270,088                         | -                             |
| <b>3240 Unemployment Assessments</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 9,281              | 375                           | 375                               | 386                              | 386                             | -                             |
| <b>3250 Worker's Comp. Assess. (WCD)</b>  |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 1,351              | 1,770                         | 1,770                             | 2,070                            | 2,001                           | -                             |
| <b>3260 Mass Transit Tax</b>              |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 17,259             | 20,013                        | 21,033                            | 21,634                           | 21,634                          | -                             |
| <b>3270 Flexible Benefits</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 798,826            | 915,840                       | 929,196                           | 915,840                          | 885,312                         | -                             |
| <b>OTHER PAYROLL EXPENSES</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                      | 1,621,096          | 1,878,933                     | 1,927,783                         | 2,004,438                        | 1,959,094                       | -                             |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>       | <b>\$1,621,096</b> | <b>\$1,878,933</b>            | <b>\$1,927,783</b>                | <b>\$2,004,438</b>               | <b>\$1,959,094</b>              | -                             |
| <b>P.S. BUDGET ADJUSTMENTS</b>            |                    |                               |                                   |                                  |                                 |                               |
| <b>3455 Vacancy Savings</b>               |                    |                               |                                   |                                  |                                 |                               |

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|---------------------------------------|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| 3400 Other Funds Ltd                  | -                  | (107,921)                     | (107,921)                         | (45,029)                         | (45,029)                        | -                             |
| <b>3465 Reconciliation Adjustment</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | 141,527                       | 141,527                           | -                                | (26,932)                        | -                             |
| <b>3470 Undistributed (P.S.)</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | (25,920)                      | -                                 | -                                | -                               | -                             |
| <b>3991 PERS Policy Adjustment</b>    |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | (119,177)                     | (119,177)                         | -                                | -                               | -                             |
| <b>P.S. BUDGET ADJUSTMENTS</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | -                  | (111,491)                     | (85,571)                          | (45,029)                         | (71,961)                        | -                             |
| <b>TOTAL P.S. BUDGET ADJUSTMENTS</b>  | -                  | <b>(\$111,491)</b>            | <b>(\$85,571)</b>                 | <b>(\$45,029)</b>                | <b>(\$71,961)</b>               | -                             |
| <b>PERSONAL SERVICES</b>              |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 4,499,009          | 5,104,693                     | 5,328,112                         | 5,565,624                        | 5,430,624                       | -                             |
| <b>TOTAL PERSONAL SERVICES</b>        | <b>\$4,499,009</b> | <b>\$5,104,693</b>            | <b>\$5,328,112</b>                | <b>\$5,565,624</b>               | <b>\$5,430,624</b>              | -                             |
| <b>SERVICES &amp; SUPPLIES</b>        |                    |                               |                                   |                                  |                                 |                               |
| <b>4100 Instate Travel</b>            |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 59,312             | 80,644                        | 80,644                            | 83,063                           | 83,063                          | -                             |
| <b>4125 Out of State Travel</b>       |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 34,084             | 18,985                        | 18,985                            | 19,555                           | 19,555                          | -                             |
| <b>4150 Employee Training</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 38,365             | 30,119                        | 30,119                            | 34,368                           | 34,368                          | -                             |
| <b>4175 Office Expenses</b>           |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                  | 74,811             | 201,869                       | 191,990                           | 209,191                          | 109,191                         | -                             |
| <b>4200 Telecommunications</b>        |                    |                               |                                   |                                  |                                 |                               |

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|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| 3400 Other Funds Ltd                         | 78,097                 | 26,814                                | 26,814                                     | 27,618                                   | 27,618                                   | -                                     |
| <b>4225 State Gov. Service Charges</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 202,926                | 203,240                               | 203,240                                    | 180,018                                  | 167,847                                  | -                                     |
| <b>4250 Data Processing</b>                  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 78,212                 | 40,732                                | 40,732                                     | 41,954                                   | 41,954                                   | -                                     |
| <b>4275 Publicity and Publications</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 10,371                 | 119,804                               | 119,804                                    | 123,398                                  | 53,398                                   | -                                     |
| <b>4300 Professional Services</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 74,297                 | 167,080                               | 167,080                                    | 172,092                                  | 72,092                                   | -                                     |
| <b>4315 IT Professional Services</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 431,886                | 72,545                                | 72,545                                     | 74,721                                   | 74,721                                   | -                                     |
| <b>4325 Attorney General</b>                 |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 97,624                 | 225,288                               | 225,288                                    | 268,543                                  | 255,955                                  | -                                     |
| <b>4375 Employee Recruitment and Develop</b> |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 225                    | 6,667                                 | 6,667                                      | 7,198                                    | 7,198                                    | -                                     |
| <b>4400 Dues and Subscriptions</b>           |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 7,028                  | 8,636                                 | 8,636                                      | 8,895                                    | 8,895                                    | -                                     |
| <b>4425 Facilities Rental and Taxes</b>      |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 361,996                | 416,932                               | 416,932                                    | 429,457                                  | 429,457                                  | -                                     |
| <b>4475 Facilities Maintenance</b>           |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 576                    | 4,077                                 | 4,077                                      | 4,199                                    | 4,199                                    | -                                     |
| <b>4575 Agency Program Related S and S</b>   |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 20,101                 | 37,258                                | 37,258                                     | 38,376                                   | 38,376                                   | -                                     |

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BDV103A - Budget Support - Detail Revenues & Expenditures  
BDV103A

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                             | 2011-13 Actuals    | 2013-15 Leg<br>Adopted Budget | 2013-15 Leg<br>Approved<br>Budget | 2015-17 Agency<br>Request Budget | 2015-17<br>Governor's<br>Budget | 2015-17 Leg<br>Adopted Budget |
|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>4650 Other Services and Supplies</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | 95,077             | 125,450                       | 125,450                           | 161,805                          | 161,805                         | -                             |
| <b>4675 Undistributed (S.S.)</b>        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | -                  | (10,138)                      | -                                 | -                                | -                               | -                             |
| <b>4700 Expendable Prop 250 - 5000</b>  |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | 4,323              | 26,290                        | 26,290                            | 27,079                           | 27,079                          | -                             |
| <b>4715 IT Expendable Property</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | 30,370             | 146,994                       | 146,994                           | 151,404                          | 76,404                          | -                             |
| <b>SERVICES &amp; SUPPLIES</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | 1,699,681          | 1,949,286                     | 1,949,545                         | 2,062,934                        | 1,693,175                       | -                             |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>    | <b>\$1,699,681</b> | <b>\$1,949,286</b>            | <b>\$1,949,545</b>                | <b>\$2,062,934</b>               | <b>\$1,693,175</b>              | <b>-</b>                      |
| <b>EXPENDITURES</b>                     |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | 6,198,690          | 7,053,979                     | 7,277,657                         | 7,628,558                        | 7,123,799                       | -                             |
| <b>TOTAL EXPENDITURES</b>               | <b>\$6,198,690</b> | <b>\$7,053,979</b>            | <b>\$7,277,657</b>                | <b>\$7,628,558</b>               | <b>\$7,123,799</b>              | <b>-</b>                      |
| <b>ENDING BALANCE</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                    | 1,978,073          | 987,972                       | 764,294                           | 9,455                            | 514,214                         | -                             |
| <b>TOTAL ENDING BALANCE</b>             | <b>\$1,978,073</b> | <b>\$987,972</b>              | <b>\$764,294</b>                  | <b>\$9,455</b>                   | <b>\$514,214</b>                | <b>-</b>                      |
| <b>AUTHORIZED POSITIONS</b>             |                    |                               |                                   |                                  |                                 |                               |
| 8150 Class/Unclass Positions            | 31                 | 30                            | 30                                | 30                               | 29                              | -                             |
| <b>TOTAL AUTHORIZED POSITIONS</b>       | <b>31</b>          | <b>30</b>                     | <b>30</b>                         | <b>30</b>                        | <b>29</b>                       | <b>-</b>                      |
| <b>AUTHORIZED FTE</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 8250 Class/Unclass FTE Positions        | 30.25              | 30.00                         | 30.00                             | 29.75                            | 29.00                           | -                             |
| 8280 FTE Reconciliation                 | -                  | -                             | (0.25)                            | -                                | -                               | -                             |

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BDV103A

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures

Cross Reference Number: 91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| <i>Description</i>          | <i>2011-13 Actuals</i> | <i>2013-15 Leg<br/>Adopted Budget</i> | <i>2013-15 Leg<br/>Approved<br/>Budget</i> | <i>2015-17 Agency<br/>Request Budget</i> | <i>2015-17<br/>Governor's<br/>Budget</i> | <i>2015-17 Leg<br/>Adopted Budget</i> |
|-----------------------------|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>TOTAL AUTHORIZED FTE</b> | 30.25                  | 30.00                                 | 29.75                                      | 29.75                                    | 29.00                                    | -                                     |



# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Version / Column Comparison Report - Detail

Cross Reference Number:91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                          | Agency Request<br>Budget (V-01)<br>2015-17 Base Budget | Governor's Budget<br>(Y-01)<br>2015-17 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--------------------------------------|--|--|----------------------------|---------------------------------------|
|                                      | Column 1   | Column 2   |                            |                                       |
| <b>BEGINNING BALANCE</b>             |  |  |                            |                                       |
| <b>0025 Beginning Balance</b>        |  |  |                            |                                       |
| 3400 Other Funds Ltd                 | 1,461,966  | 1,461,966  | 0                          | -                                     |
| <b>REVENUE CATEGORIES</b>            |  |  |                            |                                       |
| <b>LICENSES AND FEES</b>             |  |  |                            |                                       |
| <b>0205 Business Lic and Fees</b>    |  |  |                            |                                       |
| 3400 Other Funds Ltd                 | 6,065,545  | 6,065,545  | 0                          | -                                     |
| <b>CHARGES FOR SERVICES</b>          |  |  |                            |                                       |
| <b>0410 Charges for Services</b>     |  |  |                            |                                       |
| 3400 Other Funds Ltd                 | 43,333   | 43,333   | 0                          | -                                     |
| <b>FINES, RENTS AND ROYALTIES</b>    |  |  |                            |                                       |
| <b>0505 Fines and Forfeitures</b>    |  |  |                            |                                       |
| 3400 Other Funds Ltd                 | 67,169   | 67,169   | 0                          | -                                     |
| 8800 General Fund Revenue            | 50,262   | 50,262   | 0                          | -                                     |
| All Funds                            | 117,431  | 117,431  | 0                          | -                                     |
| <b>TOTAL REVENUES</b>                |  |  |                            |                                       |
| 3400 Other Funds Ltd                 | 6,176,047  | 6,176,047  | 0                          | -                                     |
| 8800 General Fund Revenue            | 50,262   | 50,262   | 0                          | -                                     |
| <b>TOTAL REVENUES</b>                | <b>\$6,226,309</b>                                     | <b>\$6,226,309</b>                                 | <b>0</b>                   | <b>-</b>                              |
| <b>TRANSFERS OUT</b>                 |  |  |                            |                                       |
| <b>2060 Transfer to General Fund</b> |  |  |                            |                                       |
| 8800 General Fund Revenue            | (50,262)   | (50,262)   | 0                          | -                                     |
| <b>AVAILABLE REVENUES</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                 | 7,638,013  | 7,638,013  | 0                          | -                                     |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Version / Column Comparison Report - Detail

Cross Reference Number:91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description | Agency Request Budget (V-01)<br>2015-17 Base Budget | Governor's Budget (Y-01)<br>2015-17 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|-------------|---|---|----------------------------|---------------------------------------|
|             | Column 1  | Column 2  |                            |                                       |

**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3110 Class/Unclass Sal. and Per Diem**

|                      |           |           |          |        |
|----------------------|-----------|-----------|----------|--------|
| 3400 Other Funds Ltd | 3,586,980 | 3,567,912 | (19,068) | -0.53% |
|----------------------|-----------|-----------|----------|--------|

**3160 Temporary Appointments**

|                      |        |        |   |   |
|----------------------|--------|--------|---|---|
| 3400 Other Funds Ltd | 14,500 | 14,500 | 0 | - |
|----------------------|--------|--------|---|---|

**3170 Overtime Payments**

|                      |       |       |   |   |
|----------------------|-------|-------|---|---|
| 3400 Other Funds Ltd | 2,682 | 2,682 | 0 | - |
|----------------------|-------|-------|---|---|

**3190 All Other Differential**

|                      |       |       |   |   |
|----------------------|-------|-------|---|---|
| 3400 Other Funds Ltd | 1,493 | 1,493 | 0 | - |
|----------------------|-------|-------|---|---|

**TOTAL SALARIES & WAGES**

|                      |           |           |          |        |
|----------------------|-----------|-----------|----------|--------|
| 3400 Other Funds Ltd | 3,605,655 | 3,586,587 | (19,068) | -0.53% |
|----------------------|-----------|-----------|----------|--------|

**OTHER PAYROLL EXPENSES**

**3210 Empl. Rel. Bd. Assessments**

|                      |       |       |   |   |
|----------------------|-------|-------|---|---|
| 3400 Other Funds Ltd | 1,320 | 1,320 | 0 | - |
|----------------------|-------|-------|---|---|

**3220 Public Employees' Retire Cont**

|                      |         |         |         |        |
|----------------------|---------|---------|---------|--------|
| 3400 Other Funds Ltd | 566,018 | 563,007 | (3,011) | -0.53% |
|----------------------|---------|---------|---------|--------|

**3221 Pension Obligation Bond**

|                      |         |         |   |   |
|----------------------|---------|---------|---|---|
| 3400 Other Funds Ltd | 201,455 | 201,455 | 0 | - |
|----------------------|---------|---------|---|---|

**3230 Social Security Taxes**

|                      |         |         |         |        |
|----------------------|---------|---------|---------|--------|
| 3400 Other Funds Ltd | 274,845 | 273,386 | (1,459) | -0.53% |
|----------------------|---------|---------|---------|--------|

**3240 Unemployment Assessments**

|                      |     |     |   |   |
|----------------------|-----|-----|---|---|
| 3400 Other Funds Ltd | 375 | 375 | 0 | - |
|----------------------|-----|-----|---|---|

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Version / Column Comparison Report - Detail

Cross Reference Number:91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                              | Agency Request<br>Budget (V-01)<br>2015-17 Base Budget | Governor's Budget<br>(Y-01)<br>2015-17 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--|--|--|----------------------------|---------------------------------------|
|  | Column 1   | Column 2   |                            |                                       |
| <b>3250 Worker's Comp. Assess. (WCD)</b> |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 2,070  | 2,070  | 0                          | -                                     |
| <b>3260 Mass Transit Tax</b>             |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 21,033   | 21,033   | 0                          | -                                     |
| <b>3270 Flexible Benefits</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 915,840  | 915,840  | 0                          | -                                     |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>      |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 1,982,956  | 1,978,486  | (4,470)                    | -0.23%                                |
| <b>P.S. BUDGET ADJUSTMENTS</b>           |  |  |                            |                                       |
| <b>3455 Vacancy Savings</b>              |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | (107,921)  | (107,921)  | 0                          | -                                     |
| <b>3465 Reconciliation Adjustment</b>    |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | -  | 23,538   | 23,538                     | 100.00%                               |
| <b>TOTAL P.S. BUDGET ADJUSTMENTS</b>     |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | (107,921)  | (84,383)   | 23,538                     | 21.81%                                |
| <b>TOTAL PERSONAL SERVICES</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 5,480,690  | 5,480,690  | 0                          | -                                     |
| <b>SERVICES &amp; SUPPLIES</b>           |  |  |                            |                                       |
| <b>4100 Instate Travel</b>               |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 80,644   | 80,644   | 0                          | -                                     |
| <b>4125 Out of State Travel</b>          |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 18,985   | 18,985   | 0                          | -                                     |
| <b>4150 Employee Training</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 33,464   | 33,464   | 0                          | -                                     |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Version / Column Comparison Report - Detail  
 2015-17 Biennium  
 Real Estate Agency

Cross Reference Number:91900-050-00-00-00000

| Description                                  | Agency Request<br>Budget (V-01)<br>2015-17 Base Budget | Governor's Budget<br>(Y-01)<br>2015-17 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--|--|--|----------------------------|---------------------------------------|
|  | Column 1   | Column 2   |                            |                                       |
| <b>4175 Office Expenses</b>                  |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 203,431  | 203,431  | 0                          | -                                     |
| <b>4200 Telecommunications</b>               |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 26,814   | 26,814   | 0                          | -                                     |
| <b>4225 State Gov. Service Charges</b>       |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 155,532  | 155,532  | 0                          | -                                     |
| <b>4250 Data Processing</b>                  |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 40,732   | 40,732   | 0                          | -                                     |
| <b>4275 Publicity and Publications</b>       |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 119,804  | 119,804  | 0                          | -                                     |
| <b>4300 Professional Services</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 167,080  | 167,080  | 0                          | -                                     |
| <b>4315 IT Professional Services</b>         |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 72,545   | 72,545   | 0                          | -                                     |
| <b>4325 Attorney General</b>                 |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 225,288  | 225,288  | 0                          | -                                     |
| <b>4375 Employee Recruitment and Develop</b> |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 6,998  | 6,998  | 0                          | -                                     |
| <b>4400 Dues and Subscriptions</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 8,636  | 8,636  | 0                          | -                                     |
| <b>4425 Facilities Rental and Taxes</b>      |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 416,932  | 416,932  | 0                          | -                                     |
| <b>4475 Facilities Maintenance</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 4,077  | 4,077  | 0                          | -                                     |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Version / Column Comparison Report - Detail

Cross Reference Number:91900-050-00-00-00000

2015-17 Biennium

Real Estate Agency

| Description                                | Agency Request<br>Budget (V-01)<br>2015-17 Base Budget | Governor's Budget<br>(Y-01)<br>2015-17 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--|--|--|----------------------------|---------------------------------------|
|  | Column 1   | Column 2   |                            |                                       |
| <b>4575 Agency Program Related S and S</b> |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 37,258   | 37,258   | 0                          | -                                     |
| <b>4650 Other Services and Supplies</b>    |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 158,041  | 158,041  | 0                          | -                                     |
| <b>4700 Expendable Prop 250 - 5000</b>     |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 26,290   | 26,290   | 0                          | -                                     |
| <b>4715 IT Expendable Property</b>         |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 146,994  | 146,994  | 0                          | -                                     |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>       |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 1,949,545  | 1,949,545  | 0                          | -                                     |
| <b>TOTAL EXPENDITURES</b>                  |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 7,430,235  | 7,430,235  | 0                          | -                                     |
| <b>ENDING BALANCE</b>                      |  |  |                            |                                       |
| 3400 Other Funds Ltd                       | 207,778  | 207,778  | 0                          | -                                     |
| <b>AUTHORIZED POSITIONS</b>                |  |  |                            |                                       |
| 8150 Class/Unclass Positions               | 30   | 30   | 0                          | -                                     |
| <b>AUTHORIZED FTE</b>                      |  |  |                            |                                       |
| 8250 Class/Unclass FTE Positions           | 29.75  | 29.50  | (0.25)                     | -0.84%                                |
| 8280 FTE Reconciliation                    | -  | 0.25   | 0.25                       | 100.00%                               |
| <b>TOTAL AUTHORIZED FTE</b>                | <b>29.75</b>   | <b>29.75</b>                                       | <b>0</b>                   | <b>-</b>                              |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
 2015-17 Biennium  
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000  
 Package: Non-PICS Psnl Svc / Vacancy Factor  
 Pkg Group: ESS Pkg Type: 010 Pkg Number: 010

| Description | Agency Request Budget (V-01) | Governor's Budget (Y-01) | Column 2 Minus Column 1 | % Change from Column 1 to Column 2 |
|-------------|------------------------------|--------------------------|-------------------------|------------------------------------|
|             | Column 1                     | Column 2                 |                         |                                    |

**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3160 Temporary Appointments**

|                      |     |     |   |       |
|----------------------|-----|-----|---|-------|
| 3400 Other Funds Ltd | 435 | 435 | 0 | 0.00% |
|----------------------|-----|-----|---|-------|

**3170 Overtime Payments**

|                      |    |    |   |       |
|----------------------|----|----|---|-------|
| 3400 Other Funds Ltd | 80 | 80 | 0 | 0.00% |
|----------------------|----|----|---|-------|

**3190 All Other Differential**

|                      |    |    |   |       |
|----------------------|----|----|---|-------|
| 3400 Other Funds Ltd | 45 | 45 | 0 | 0.00% |
|----------------------|----|----|---|-------|

**SALARIES & WAGES**

|                      |     |     |   |       |
|----------------------|-----|-----|---|-------|
| 3400 Other Funds Ltd | 560 | 560 | 0 | 0.00% |
|----------------------|-----|-----|---|-------|

**TOTAL SALARIES & WAGES**

|  |              |              |            |              |
|--|--------------|--------------|------------|--------------|
|  | <b>\$560</b> | <b>\$560</b> | <b>\$0</b> | <b>0.00%</b> |
|--|--------------|--------------|------------|--------------|

**OTHER PAYROLL EXPENSES**

**3220 Public Employees Retire Cont**

|                      |    |    |   |       |
|----------------------|----|----|---|-------|
| 3400 Other Funds Ltd | 20 | 20 | 0 | 0.00% |
|----------------------|----|----|---|-------|

**3221 Pension Obligation Bond**

|                      |        |        |   |       |
|----------------------|--------|--------|---|-------|
| 3400 Other Funds Ltd | 20,808 | 20,808 | 0 | 0.00% |
|----------------------|--------|--------|---|-------|

**3230 Social Security Taxes**

|                      |    |    |   |       |
|----------------------|----|----|---|-------|
| 3400 Other Funds Ltd | 42 | 42 | 0 | 0.00% |
|----------------------|----|----|---|-------|

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
2015-17 Biennium  
Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000  
Package: Non-PICS Psnl Svc / Vacancy Factor  
Pkg Group: ESS Pkg Type: 010 Pkg Number: 010

| Description                          | Agency Request Budget (V-01) | Governor's Budget (Y-01) | Column 2 Minus Column 1 | % Change from Column 1 to Column 2 |
|--------------------------------------|------------------------------|--------------------------|-------------------------|------------------------------------|
|                                      | Column 1                     | Column 2                 |                         |                                    |
| <b>3240 Unemployment Assessments</b> |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 11                           | 11                       | 0                       | 0.00%                              |
| <b>3260 Mass Transit Tax</b>         |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 601                          | 601                      | 0                       | 0.00%                              |
| <b>OTHER PAYROLL EXPENSES</b>        |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 21,482                       | 21,482                   | 0                       | 0.00%                              |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>  | <b>\$21,482</b>              | <b>\$21,482</b>          | <b>\$0</b>              | <b>0.00%</b>                       |
| <b>P.S. BUDGET ADJUSTMENTS</b>       |                              |                          |                         |                                    |
| <b>3455 Vacancy Savings</b>          |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 62,892                       | 62,892                   | 0                       | 0.00%                              |
| <b>P.S. BUDGET ADJUSTMENTS</b>       |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 62,892                       | 62,892                   | 0                       | 0.00%                              |
| <b>TOTAL P.S. BUDGET ADJUSTMENTS</b> | <b>\$62,892</b>              | <b>\$62,892</b>          | <b>\$0</b>              | <b>0.00%</b>                       |
| <b>PERSONAL SERVICES</b>             |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 84,934                       | 84,934                   | 0                       | 0.00%                              |
| <b>TOTAL PERSONAL SERVICES</b>       | <b>\$84,934</b>              | <b>\$84,934</b>          | <b>\$0</b>              | <b>0.00%</b>                       |
| <b>EXPENDITURES</b>                  |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                 | 84,934                       | 84,934                   | 0                       | 0.00%                              |
| <b>TOTAL EXPENDITURES</b>            | <b>\$84,934</b>              | <b>\$84,934</b>          | <b>\$0</b>              | <b>0.00%</b>                       |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
 2015-17 Biennium  
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000  
 Package: Non-PICS Psnl Svc / Vacancy Factor  
 Pkg Group: ESS Pkg Type: 010 Pkg Number: 010

| Description                 | Agency Request Budget (V-01) | Governor's Budget (Y-01) | Column 2 Minus Column 1 | % Change from Column 1 to Column 2 |
|-----------------------------|------------------------------|--------------------------|-------------------------|------------------------------------|
|                             | Column 1                     | Column 2                 |                         |                                    |
| <b>ENDING BALANCE</b>       |                              |                          |                         |                                    |
| 3400 Other Funds Ltd        | (84,934)                     | (84,934)                 | 0                       | 0.00%                              |
| <b>TOTAL ENDING BALANCE</b> | <b>(\$84,934)</b>            | <b>(\$84,934)</b>        | <b>\$0</b>              | <b>0.00%</b>                       |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
 2015-17 Biennium  
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000

Package: Standard Inflation

Pkg Group: ESS Pkg Type: 030 Pkg Number: 031

| Description | Agency Request Budget (V-01) | Governor's Budget (Y-01) | Column 2 Minus Column 1 | % Change from Column 1 to Column 2 |
|-------------|------------------------------|--------------------------|-------------------------|------------------------------------|
|             | Column 1                     | Column 2                 |                         |                                    |

**EXPENDITURES**

**SERVICES & SUPPLIES**

**4100 Instate Travel**

|                      |       |       |   |       |
|----------------------|-------|-------|---|-------|
| 3400 Other Funds Ltd | 2,419 | 2,419 | 0 | 0.00% |
|----------------------|-------|-------|---|-------|

**4125 Out of State Travel**

|                      |     |     |   |       |
|----------------------|-----|-----|---|-------|
| 3400 Other Funds Ltd | 570 | 570 | 0 | 0.00% |
|----------------------|-----|-----|---|-------|

**4150 Employee Training**

|                      |     |     |   |       |
|----------------------|-----|-----|---|-------|
| 3400 Other Funds Ltd | 904 | 904 | 0 | 0.00% |
|----------------------|-----|-----|---|-------|

**4175 Office Expenses**

|                      |       |       |   |       |
|----------------------|-------|-------|---|-------|
| 3400 Other Funds Ltd | 5,760 | 5,760 | 0 | 0.00% |
|----------------------|-------|-------|---|-------|

**4200 Telecommunications**

|                      |     |     |   |       |
|----------------------|-----|-----|---|-------|
| 3400 Other Funds Ltd | 804 | 804 | 0 | 0.00% |
|----------------------|-----|-----|---|-------|

**4225 State Gov. Service Charges**

|                      |        |        |          |          |
|----------------------|--------|--------|----------|----------|
| 3400 Other Funds Ltd | 24,486 | 12,315 | (12,171) | (49.71%) |
|----------------------|--------|--------|----------|----------|

**4250 Data Processing**

|                      |       |       |   |       |
|----------------------|-------|-------|---|-------|
| 3400 Other Funds Ltd | 1,222 | 1,222 | 0 | 0.00% |
|----------------------|-------|-------|---|-------|

**4275 Publicity and Publications**

|                      |       |       |   |       |
|----------------------|-------|-------|---|-------|
| 3400 Other Funds Ltd | 3,594 | 3,594 | 0 | 0.00% |
|----------------------|-------|-------|---|-------|

**4300 Professional Services**

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail

Cross Reference Number: 91900-050-00-00-00000

2015-17 Biennium

Package: Standard Inflation

Real Estate Agency

Pkg Group: ESS Pkg Type: 030 Pkg Number: 031

| Description                                  | Agency Request Budget<br>(V-01) | Governor's Budget (Y-01) | Column 2 Minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--|---------------------------------|--------------------------|----------------------------|---------------------------------------|
|  | Column 1                        | Column 2                 |                            |                                       |
| 3400 Other Funds Ltd                         | 5,012                           | 5,012                    | 0                          | 0.00%                                 |
| <b>4315 IT Professional Services</b>         |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 2,176                           | 2,176                    | 0                          | 0.00%                                 |
| <b>4325 Attorney General</b>                 |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 43,255                          | 30,667                   | (12,588)                   | (29.10%)                              |
| <b>4375 Employee Recruitment and Develop</b> |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 200                             | 200                      | 0                          | 0.00%                                 |
| <b>4400 Dues and Subscriptions</b>           |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 259                             | 259                      | 0                          | 0.00%                                 |
| <b>4425 Facilities Rental and Taxes</b>      |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 12,525                          | 12,525                   | 0                          | 0.00%                                 |
| <b>4475 Facilities Maintenance</b>           |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 122                             | 122                      | 0                          | 0.00%                                 |
| <b>4575 Agency Program Related S and S</b>   |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 1,118                           | 1,118                    | 0                          | 0.00%                                 |
| <b>4650 Other Services and Supplies</b>      |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 3,764                           | 3,764                    | 0                          | 0.00%                                 |
| <b>4700 Expendable Prop 250 - 5000</b>       |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                         | 789                             | 789                      | 0                          | 0.00%                                 |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
 2015-17 Biennium  
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000

Package: Standard Inflation

Pkg Group: ESS Pkg Type: 030 Pkg Number: 031

| Description                          | Agency Request Budget<br>(V-01) | Governor's Budget (Y-01) | Column 2 Minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--------------------------------------|---------------------------------|--------------------------|----------------------------|---------------------------------------|
|                                      | Column 1                        | Column 2                 |                            |                                       |
| <b>4715 IT Expendable Property</b>   |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | 4,410                           | 4,410                    | 0                          | 0.00%                                 |
| <b>SERVICES &amp; SUPPLIES</b>       |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | 113,389                         | 88,630                   | (24,759)                   | (21.84%)                              |
| <b>TOTAL SERVICES &amp; SUPPLIES</b> | <b>\$113,389</b>                | <b>\$88,630</b>          | <b>(\$24,759)</b>          | <b>(21.84%)</b>                       |
| <b>EXPENDITURES</b>                  |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | 113,389                         | 88,630                   | (24,759)                   | (21.84%)                              |
| <b>TOTAL EXPENDITURES</b>            | <b>\$113,389</b>                | <b>\$88,630</b>          | <b>(\$24,759)</b>          | <b>(21.84%)</b>                       |
| <b>ENDING BALANCE</b>                |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | (113,389)                       | (88,630)                 | 24,759                     | 21.84%                                |
| <b>TOTAL ENDING BALANCE</b>          | <b>(\$113,389)</b>              | <b>(\$88,630)</b>        | <b>\$24,759</b>            | <b>21.84%</b>                         |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
2015-17 Biennium  
Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000

Package: Analyst Adjustments

Pkg Group: POL Pkg Type: 090 Pkg Number: 090

| Description | Agency Request Budget (V-01) | Governor's Budget (Y-01) | Column 2 Minus Column 1 | % Change from Column 1 to Column 2 |
|-------------|------------------------------|--------------------------|-------------------------|------------------------------------|
|             | Column 1                     | Column 2                 |                         |                                    |

**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3110 Class/Unclass Sal. and Per Diem**

|                      |   |          |          |         |
|----------------------|---|----------|----------|---------|
| 3400 Other Funds Ltd | - | (43,656) | (43,656) | 100.00% |
|----------------------|---|----------|----------|---------|

**SALARIES & WAGES**

|                      |   |          |          |         |
|----------------------|---|----------|----------|---------|
| 3400 Other Funds Ltd | - | (43,656) | (43,656) | 100.00% |
|----------------------|---|----------|----------|---------|

|                                   |          |                   |                   |                |
|-----------------------------------|----------|-------------------|-------------------|----------------|
| <b>TOTAL SALARIES &amp; WAGES</b> | <b>-</b> | <b>(\$43,656)</b> | <b>(\$43,656)</b> | <b>100.00%</b> |
|-----------------------------------|----------|-------------------|-------------------|----------------|

**OTHER PAYROLL EXPENSES**

**3210 Empl. Rel. Bd. Assessments**

|                      |   |      |      |         |
|----------------------|---|------|------|---------|
| 3400 Other Funds Ltd | - | (44) | (44) | 100.00% |
|----------------------|---|------|------|---------|

**3220 Public Employees Retire Cont**

|                      |   |         |         |         |
|----------------------|---|---------|---------|---------|
| 3400 Other Funds Ltd | - | (6,893) | (6,893) | 100.00% |
|----------------------|---|---------|---------|---------|

**3230 Social Security Taxes**

|                      |   |         |         |         |
|----------------------|---|---------|---------|---------|
| 3400 Other Funds Ltd | - | (3,340) | (3,340) | 100.00% |
|----------------------|---|---------|---------|---------|

**3250 Workers Comp. Assess. (WCD)**

|                      |   |      |      |         |
|----------------------|---|------|------|---------|
| 3400 Other Funds Ltd | - | (69) | (69) | 100.00% |
|----------------------|---|------|------|---------|

**3270 Flexible Benefits**

|                      |   |          |          |         |
|----------------------|---|----------|----------|---------|
| 3400 Other Funds Ltd | - | (30,528) | (30,528) | 100.00% |
|----------------------|---|----------|----------|---------|

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail  
2015-17 Biennium  
Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000  
Package: Analyst Adjustments  
Pkg Group: POL Pkg Type: 090 Pkg Number: 090

| Description                            | Agency Request Budget (V-01) | Governor's Budget (Y-01) | Column 2 Minus Column 1 | % Change from Column 1 to Column 2 |
|--|------------------------------|--------------------------|-------------------------|------------------------------------|
|  | Column 1                     | Column 2                 |                         |                                    |
| <b>OTHER PAYROLL EXPENSES</b>          |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (40,874)                 | (40,874)                | 100.00%                            |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>    | <b>-</b>                     | <b>(\$40,874)</b>        | <b>(\$40,874)</b>       | <b>100.00%</b>                     |
| <b>P.S. BUDGET ADJUSTMENTS</b>         |                              |                          |                         |                                    |
| <b>3465 Reconciliation Adjustment</b>  |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (50,470)                 | (50,470)                | 100.00%                            |
| <b>P.S. BUDGET ADJUSTMENTS</b>         |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (50,470)                 | (50,470)                | 100.00%                            |
| <b>TOTAL P.S. BUDGET ADJUSTMENTS</b>   | <b>-</b>                     | <b>(\$50,470)</b>        | <b>(\$50,470)</b>       | <b>100.00%</b>                     |
| <b>PERSONAL SERVICES</b>               |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (135,000)                | (135,000)               | 100.00%                            |
| <b>TOTAL PERSONAL SERVICES</b>         | <b>-</b>                     | <b>(\$135,000)</b>       | <b>(\$135,000)</b>      | <b>100.00%</b>                     |
| <b>SERVICES &amp; SUPPLIES</b>         |                              |                          |                         |                                    |
| <b>4175 Office Expenses</b>            |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (100,000)                | (100,000)               | 100.00%                            |
| <b>4275 Publicity and Publications</b> |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (70,000)                 | (70,000)                | 100.00%                            |
| <b>4300 Professional Services</b>      |                              |                          |                         |                                    |
| 3400 Other Funds Ltd                   | -                            | (100,000)                | (100,000)               | 100.00%                            |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Package Comparison Report - Detail

Cross Reference Number: 91900-050-00-00-00000

2015-17 Biennium

Package: Analyst Adjustments

Real Estate Agency

Pkg Group: POL Pkg Type: 090 Pkg Number: 090

| Description                          | Agency Request Budget<br>(V-01) | Governor's Budget (Y-01) | Column 2 Minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--------------------------------------|---------------------------------|--------------------------|----------------------------|---------------------------------------|
|                                      | Column 1                        | Column 2                 |                            |                                       |
| <b>4715 IT Expendable Property</b>   |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | -                               | (75,000)                 | (75,000)                   | 100.00%                               |
| <b>SERVICES &amp; SUPPLIES</b>       |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | -                               | (345,000)                | (345,000)                  | 100.00%                               |
| <b>TOTAL SERVICES &amp; SUPPLIES</b> | -                               | <b>(\$345,000)</b>       | <b>(\$345,000)</b>         | <b>100.00%</b>                        |
| <b>EXPENDITURES</b>                  |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | -                               | (480,000)                | (480,000)                  | 100.00%                               |
| <b>TOTAL EXPENDITURES</b>            | -                               | <b>(\$480,000)</b>       | <b>(\$480,000)</b>         | <b>100.00%</b>                        |
| <b>ENDING BALANCE</b>                |                                 |                          |                            |                                       |
| 3400 Other Funds Ltd                 | -                               | 480,000                  | 480,000                    | 100.00%                               |
| <b>TOTAL ENDING BALANCE</b>          | -                               | <b>\$480,000</b>         | <b>\$480,000</b>           | <b>100.00%</b>                        |
| <b>AUTHORIZED POSITIONS</b>          |                                 |                          |                            |                                       |
| 8150 Class/Unclass Positions         | -                               | (1)                      | (1)                        | 100.00%                               |
| <b>AUTHORIZED FTE</b>                |                                 |                          |                            |                                       |
| 8250 Class/Unclass FTE Positions     | -                               | (0.50)                   | (0.50)                     | 100.00%                               |
| 8280 FTE Reconciliation              | -                               | (0.25)                   | (0.25)                     | 100.00%                               |
| <b>TOTAL AUTHORIZED FTE</b>          | -                               | <b>(0.75)</b>            | <b>(0.75)</b>              | <b>100.00%</b>                        |

# BUDGET NARRATIVE

12/22/14 REPORT NO.: PPDPLBUDCL  
 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:91900 REAL ESTATE AGENCY  
 SUMMARY XREF:050-00-00 000 Real Estate Agency

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 PICS SYSTEM: BUDGET PREPARATION

| PKG | CLASS | COMP  | DESCRIPTION                       | POS<br>CNT | FTE   | MOS    | AVERAGE<br>RATE | GF<br>SAL | OF<br>SAL | FF<br>SAL | LF<br>SAL | AF<br>SAL |
|-----|-------|-------|-----------------------------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
| 000 | AR    | C0104 | AA OFFICE SPECIALIST 2            | 1          | 1.00  | 24.00  | 3,139.00        |           | 75,336    |           |           | 75,336    |
| 000 | AR    | C0108 | AA ADMINISTRATIVE SPECIALIST 2    | 3          | 3.00  | 72.00  | 3,328.66        |           | 239,664   |           |           | 239,664   |
| 000 | AR    | C0324 | AA PUBLIC SERVICE REP 4           | 1          | 1.00  | 24.00  | 3,973.00        |           | 95,352    |           |           | 95,352    |
| 000 | AR    | C0860 | AA PROGRAM ANALYST 1              | 1          | 1.00  | 24.00  | 4,162.00        |           | 99,888    |           |           | 99,888    |
| 000 | AR    | C0863 | AA PROGRAM ANALYST 4              | 1          | 1.00  | 24.00  | 5,530.00        |           | 132,720   |           |           | 132,720   |
| 000 | AR    | C0865 | AA PUBLIC AFFAIRS SPECIALIST 2    | 1          | 1.00  | 24.00  | 6,381.00        |           | 153,144   |           |           | 153,144   |
| 000 | AR    | C0872 | AA OPERATIONS & POLICY ANALYST 3  | 1          | 1.00  | 24.00  | 6,081.00        |           | 145,944   |           |           | 145,944   |
| 000 | AR    | C1216 | AA ACCOUNTANT 2                   | 1          | 1.00  | 24.00  | 4,571.00        |           | 109,704   |           |           | 109,704   |
| 000 | AR    | C1483 | IA INFO SYSTEMS SPECIALIST 3      | 1          | .50   | 12.00  | 3,638.00        |           | 43,656    |           |           | 43,656    |
| 000 | AR    | C1486 | IA INFO SYSTEMS SPECIALIST 6      | 1          | 1.00  | 24.00  | 5,409.00        |           | 129,816   |           |           | 129,816   |
| 000 | AR    | C5235 | AA FINANCIAL INVESTIGATOR 1       | 7          | 7.00  | 168.00 | 4,564.14        |           | 766,776   |           |           | 766,776   |
| 000 | AR    | C5246 | AA COMPLIANCE SPECIALIST 1        | 3          | 3.00  | 72.00  | 4,038.00        |           | 290,736   |           |           | 290,736   |
| 000 | AR    | C5247 | AA COMPLIANCE SPECIALIST 2        | 1          | 1.00  | 24.00  | 3,782.00        |           | 90,768    |           |           | 90,768    |
| 000 | AR    | C5248 | AA COMPLIANCE SPECIALIST 3        | 1          | 1.00  | 24.00  | 6,381.00        |           | 153,144   |           |           | 153,144   |
| 000 | B     | Y7500 | AE BOARD AND COMMISSION MEMBER    |            | .00   | .00    | 0.00            |           | 6,480     |           |           | 6,480     |
| 000 | MEAHZ | 7012  | HA PRINCIPAL EXECUTIVE/MANAGER G  | 1          | 1.00  | 24.00  | 10,986.00       |           | 263,664   |           |           | 263,664   |
| 000 | MENNZ | 20119 | AA EXECUTIVE SUPPORT SPECIALIST 2 | 1          | 1.00  | 24.00  | 3,717.00        |           | 89,208    |           |           | 89,208    |
| 000 | MESNZ | 7010  | AA PRINCIPAL EXECUTIVE/MANAGER F  | 1          | 1.00  | 24.00  | 8,496.00        |           | 203,904   |           |           | 203,904   |
| 000 | MMS   | X7004 | AA PRINCIPAL EXECUTIVE/MANAGER C  | 1          | 1.00  | 24.00  | 5,231.00        |           | 125,544   |           |           | 125,544   |
| 000 | MMS   | X7006 | AA PRINCIPAL EXECUTIVE/MANAGER D  | 1          | 1.00  | 24.00  | 7,343.00        |           | 176,232   |           |           | 176,232   |
| 000 | MMS   | X7008 | AA PRINCIPAL EXECUTIVE/MANAGER E  | 1          | 1.00  | 24.00  | 7,343.00        |           | 176,232   |           |           | 176,232   |
| 000 |       |       |                                   | 30         | 29.50 | 708.00 | 3,851.58        |           | 3,567,912 |           |           | 3,567,912 |

# BUDGET NARRATIVE

12/22/14 REPORT NO.: PPDELBUDCI  
 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:91900 REAL ESTATE AGENCY  
 SUMMARY XREF:050-00-00 090 Real Estate Agency

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 PICS SYSTEM: BUDGET PREPARATION

| PKG | CLASS | COMP  | DESCRIPTION                  | POS<br>CNT | FTE   | MOS    | AVERAGE<br>RATE | GF<br>SAL | OF<br>SAL | PF<br>SAL | LF<br>SAL | AF<br>SAL |
|-----|-------|-------|------------------------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
| 090 | AR    | CI483 | IA INFO SYSTEMS SPECIALIST 3 | 1-         | .50-  | 12.00- | 3,638.00        |           | 43,656-   |           |           | 43,656-   |
| 090 |       |       |                              | 1-         | .50-  | 12.00- | 3,638.00        |           | 43,656-   |           |           | 43,656-   |
|     |       |       |                              | 29         | 29.00 | 696.00 | 3,846.25        |           | 3,524,256 |           |           | 3,524,256 |
|     |       |       |                              | 29         | 29.00 | 696.00 | 3,846.25        |           | 3,524,256 |           |           | 3,524,256 |

# BUDGET NARRATIVE

12/22/14 REPORT NO.: PPDFLBUDCL  
 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:91900 REAL ESTATE AGENCY  
 SUMMARY XREF:050-00-00 090 Real Estate Agency .

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 PICS SYSTEM: BUDGET PREPARATION

| PKG | CLASS | COMP | DESCRIPTION | POS<br>CNT | FTE   | MOS    | AVERAGE<br>RATE | GF<br>SAL | OF<br>SAL | PF<br>SAL | LF<br>SAL | AF<br>SAL |
|-----|-------|------|-------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
|     |       |      |             | 29         | 29.00 | 696.00 | 3,846.25        |           | 3,524,256 |           |           | 3,524,256 |



# BUDGET NARRATIVE

L2/22/14 REPORT NO.: PPDPLAGYCL  
 REPORT: SUMMARY LIST BY PKG BY AGENCY  
 AGENCY: 91900 REAL ESTATE AGENCY

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| PKG | CLASS     | COMP  | DESCRIPTION                      | POS<br>CNT | FTE   | MOS    | AVERAGE<br>RATE | OF<br>SAL | OF<br>SAL | PF<br>SAL | LF<br>SAL | AF<br>SAL |
|-----|-----------|-------|----------------------------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
| 000 | AR        | C0104 | AA OFFICE SPECIALIST 2           | 1          | 1.00  | 24.00  | 3,139.00        |           | 75,336    |           |           | 75,336    |
| 000 | AR        | C0108 | AA ADMINISTRATIVE SPECIALIST 2   | 3          | 3.00  | 72.00  | 3,328.66        |           | 239,664   |           |           | 239,664   |
| 000 | AR        | C0324 | AA PUBLIC SERVICE REP 4          | 1          | 1.00  | 24.00  | 3,973.00        |           | 95,352    |           |           | 95,352    |
| 000 | AR        | C0860 | AA PROGRAM ANALYST 1             | 1          | 1.00  | 24.00  | 4,162.00        |           | 99,888    |           |           | 99,888    |
| 000 | AR        | C0863 | AA PROGRAM ANALYST 4             | 1          | 1.00  | 24.00  | 5,530.00        |           | 132,720   |           |           | 132,720   |
| 000 | AR        | C0865 | AA PUBLIC AFFAIRS SPECIALIST 2   | 1          | 1.00  | 24.00  | 6,381.00        |           | 153,144   |           |           | 153,144   |
| 000 | AR        | C0872 | AA OPERATIONS & POLICY ANALYST 3 | 1          | 1.00  | 24.00  | 6,081.00        |           | 145,944   |           |           | 145,944   |
| 000 | AR        | C1216 | AA ACCOUNTANT 2                  | 1          | 1.00  | 24.00  | 4,571.00        |           | 109,704   |           |           | 109,704   |
| 090 | AR        | C1483 | IA INFO SYSTEMS SPECIALIST 3     |            | .00   | .00    | 3,638.00        |           |           |           |           |           |
| 000 | AR        | C1486 | IA INFO SYSTEMS SPECIALIST 6     | 1          | 1.00  | 24.00  | 5,409.00        |           | 129,816   |           |           | 129,816   |
| 000 | AR        | C5235 | AA FINANCIAL INVESTIGATOR 1      | 7          | 7.00  | 168.00 | 4,564.14        |           | 766,776   |           |           | 766,776   |
| 000 | AR        | C5246 | AA COMPLIANCE SPECIALIST 1       | 3          | 3.00  | 72.00  | 4,038.00        |           | 290,736   |           |           | 290,736   |
| 000 | AR        | C5247 | AA COMPLIANCE SPECIALIST 2       | 1          | 1.00  | 24.00  | 3,782.00        |           | 90,768    |           |           | 90,768    |
| 000 | AR        | C5248 | AA COMPLIANCE SPECIALIST 3       | 1          | 1.00  | 24.00  | 6,381.00        |           | 153,144   |           |           | 153,144   |
| 000 | B         | Y7500 | AE BOARD AND COMMISSION MEMBER   |            | .00   | .00    | 0.00            |           | 6,480     |           |           | 6,480     |
| 000 | MEAHZ7012 | HA    | PRINCIPAL EXECUTIVE/MANAGER G    | 1          | 1.00  | 24.00  | 10,986.00       |           | 263,664   |           |           | 263,664   |
| 000 | MENNZ0119 | AA    | EXECUTIVE SUPPORT SPECIALIST 2   | 1          | 1.00  | 24.00  | 3,717.00        |           | 89,208    |           |           | 89,208    |
| 000 | MESNZ7010 | AA    | PRINCIPAL EXECUTIVE/MANAGER F    | 1          | 1.00  | 24.00  | 8,496.00        |           | 203,904   |           |           | 203,904   |
| 000 | MMS       | X7004 | AA PRINCIPAL EXECUTIVE/MANAGER C | 1          | 1.00  | 24.00  | 5,231.00        |           | 125,544   |           |           | 125,544   |
| 000 | MMS       | X7006 | AA PRINCIPAL EXECUTIVE/MANAGER D | 1          | 1.00  | 24.00  | 7,343.00        |           | 176,232   |           |           | 176,232   |
| 000 | MMS       | X7008 | AA PRINCIPAL EXECUTIVE/MANAGER E | 1          | 1.00  | 24.00  | 7,343.00        |           | 176,232   |           |           | 176,232   |
|     |           |       |                                  | 29         | 29.00 | 696.00 | 3,846.25        |           | 3,524,256 |           |           | 3,524,256 |

# BUDGET NARRATIVE

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12/22/14 REPORT NO.: PPDPLAGYCL  
 REPORT: SUMMARY LIST BY PKG BY AGENCY  
 AGENCY: 91900 REAL ESTATE AGENCY

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE  
 2015-17  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

| PKG | CLASS | COMP | DESCRIPTION | POS<br>CNT | FTE   | MOS    | AVERAGE<br>RATE | GF<br>SAL | OF<br>SAL | FF<br>SAL | LF<br>SAL | AF<br>SAL |
|-----|-------|------|-------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
|     |       |      |             | 29         | 29.00 | 696.00 | 3,846.25        |           | 3,524,256 |           |           | 3,524,256 |

# BUDGET NARRATIVE

12/22/14 REPORT NO.: PPDEPLWSBUD  
 REPORT: DETAIL LISTING BY SUMMARY XREF AGENCY  
 AGENCY: 91900 REAL ESTATE AGENCY  
 SUMMARY XREF: 050-00-00 090 Real Estate Agency

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE  
 2015-17  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

| POSITION<br>NUMBER   | AUTH NO   | ORG STRUC       | PKG Y                | F POS<br>TYP | CLASS | COMP | RNG P    | S<br>T<br>POS<br>CNT | FTE | BUDGET<br>RATE | MOS      | GF<br>SAL | OF<br>SAL | FF<br>SAL | LF<br>SAL | T<br>R<br>K |
|----------------------|-----------|-----------------|----------------------|--------------|-------|------|----------|----------------------|-----|----------------|----------|-----------|-----------|-----------|-----------|-------------|
| 0005020              | 000512520 | 050-01-00-00000 | 090                  | 0            | PP    | AR   | C1483 IA | 24 02                | 1-  | .50-           | 3,638.00 | 12.00-    |           |           | 43,656-   |             |
| EST DATE: 2015/07/01 |           |                 | EXP DATE: 9999/01/01 |              |       |      |          |                      |     |                |          |           |           |           |           |             |
|                      |           |                 | 090                  |              |       |      |          |                      | 1-  | .50-           |          | 12.00-    |           |           | 43,656-   |             |
|                      |           |                 |                      |              |       |      |          |                      | 1-  | .50-           |          | 12.00-    |           |           | 43,656-   |             |
|                      |           |                 |                      |              |       |      |          |                      | 1-  | .50-           |          | 12.00-    |           |           | 43,656-   |             |

# BUDGET NARRATIVE

12/22/14 REPORT NO.: PPDPLWSBUD  
 REPORT: DETAIL LISTING BY SUMMARY XREF AGENCY  
 AGENCY: 91900 REAL ESTATE AGENCY  
 SUMMARY XREF: 050-00-00 090 Real Estate Agency

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE  
 2015-17  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

| POSITION<br>NUMBER | AUTH NO | ORG STRUC | F POS<br>PKG Y TYP | CLASS COMP | S<br>T<br>RNG P | POS<br>CNT | FTE  | BUDGET<br>RATE | MOS    | GF<br>SAL | OF<br>SAL | FF<br>SAL | LF<br>SAL | T<br>R<br>K |
|--------------------|---------|-----------|--------------------|------------|-----------------|------------|------|----------------|--------|-----------|-----------|-----------|-----------|-------------|
|                    |         |           |                    |            |                 | 1-         | .50- |                | 12.00- |           |           | 43,656-   |           |             |

# BUDGET NARRATIVE

12/22/14 REPORT NO.: FPDPFISCAL  
 REPORT: PACKAGE FISCAL IMPACT REPORT  
 AGENCY: 91900 REAL ESTATE AGENCY  
 SUMMARY XREF: 050-00-00 Real Estate Agency

DEPT. OF ADMIN. SVCS. -- FPDB PICS SYSTEM

PAGE  
 2015-17  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 090 - Analyst Adjustments

| POSITION |       |       | POS                            |     |       |        |      | GF       | OF      | FF      | LF      | AF      |         |
|----------|-------|-------|--------------------------------|-----|-------|--------|------|----------|---------|---------|---------|---------|---------|
| NUMBER   | CLASS | COMP  | CLASS NAME                     | CNT | FTE   | MOS    | STEP | RATE     | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE |
| 0005020  | AR    | C1483 | IA INFO SYSTEMS SPECIALIST 3   | 1-  | .50-  | 12.00- | 02   | 3,638.00 |         | 43,656- |         |         | 43,656- |
|          |       |       |                                |     |       |        |      |          |         | 40,874- |         |         | 40,874- |
|          |       |       | TOTAL PICS SALARY              |     |       |        |      |          |         | 43,656- |         |         | 43,656- |
|          |       |       | TOTAL PICS OPE                 |     |       |        |      |          |         | 40,874- |         |         | 40,874- |
|          |       |       |                                | --- | ----- | -----  |      |          | -----   | -----   | -----   | -----   | -----   |
|          |       |       | TOTAL PICS PERSONAL SERVICES = | 1-  | .50-  | 12.00- |      |          |         | 84,530- |         |         | 84,530- |

# BUDGET NARRATIVE

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## REAL ESTATE AGENCY

### Annual Performance Progress Report (APPR) for Fiscal Year (2013-2014)

Original Submission Date: 2014

Finalize Date: 11/6/2014

# BUDGET NARRATIVE

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| 2013-2014<br>KPM # | 2013-2014 Approved Key Performance Measures (KPMs)   |
|--------------------|--|
| 1                  | Compliance Rate Achieved - Percent of property managers/principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review.  |
| 2                  | Percent of investigations completed within 150 days of receipt of complaint.   |
| 3                  | Contested Case Actions resolved through settlement – percent of contested case actions that are resolved through informal settlement resolution and prior to a formal hearing before the Office of Administrative Hearings.            |
| 4                  | Percent of licensees who rate the board-administered exam as “good” or “excellent” as an effective screen for competent and ethical professionals.   |
| 5                  | CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. |

# BUDGET NARRATIVE

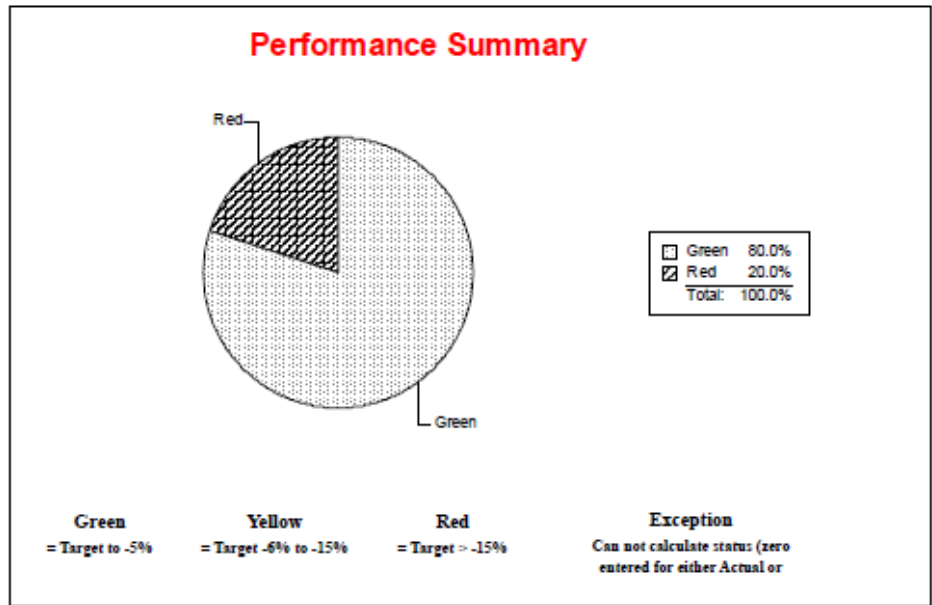
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| New<br>Delete | Proposed Key Performance Measures (KPM's) for Biennium 2015-2017 |
|---------------|--|
|               | Title:<br><br>Rationale:   |



# BUDGET NARRATIVE

|   |                                    |
|---|------------------------------------|
| <b>REAL ESTATE AGENCY</b>   | <b>I. EXECUTIVE SUMMARY</b>        |
| <b>Agency Mission:</b> To provide quality protection for Oregon consumers of real estate, escrow and land development services, balanced with a professional environment conducive to a healthy real estate market. |                                    |
| <b>Contact:</b> Erica Kleiner   | <b>Contact Phone:</b> 503-378-4409 |
| <b>Alternate:</b>   | <b>Alternate Phone:</b>            |



## I. SCOPE OF REPORT

The Real Estate Agency is responsible for the licensing, education and enforcement of Oregon's real estate laws applicable to brokers, property managers, real estate marketing organizations, registration and regulation of escrow businesses, subdivisions, condominiums, timeshares, campgrounds, registration, and public report issuance. The performance measures are used as management tools in directing resources and responding to the needs of the industry and the Oregon consumer. Key Performance Measures capture Agency responsiveness to the industry's needs, as well as our ability to provide customer service to both the real estate industry and the Oregon consumer.

# BUDGET NARRATIVE

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## 2. THE OREGON CONTEXT

The Oregon Real Estate Agency licenses and regulates the Oregon Real Estate Industry. The Agency's performance measures are linked to the Agency mission, not to benchmarks.

## 3. PERFORMANCE SUMMARY

As an accountability tool, Agency management reviews its performance results on a weekly and in some cases monthly basis to determine if performance is in an acceptable range.

## 4. CHALLENGES

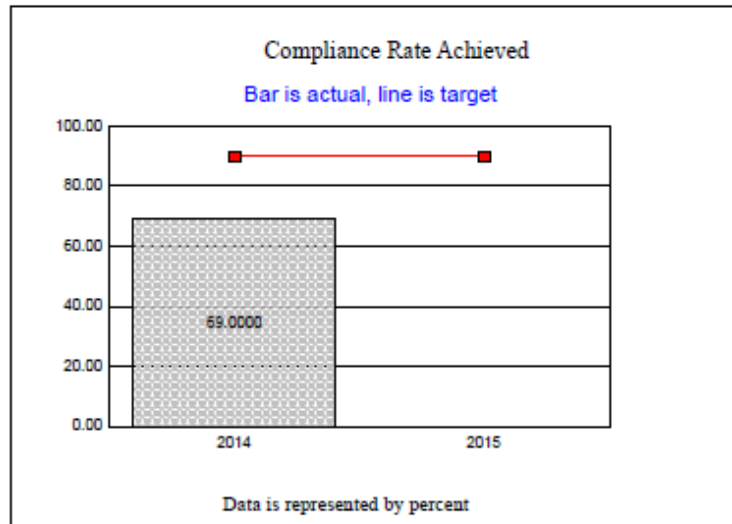
The Agency licenses approximately 19,000 individuals. The Agency receives a high volume of phone calls and public inquiries. The ability to respond to customers needs in a responsive and knowledgeable manner is key to the Agency's success. This challenge can be met with staff members who are trained to deliver high quality service and retained to prevent the loss of knowledge associated with frequent turnover.

## 5. RESOURCES AND EFFICIENCY

The Agency's Legislatively Approved Budget for 2013-15 is \$7,277,657 Other Funds and 29.75 FTE.

# BUDGET NARRATIVE

|                           |   |                                 |
|---------------------------|---|---------------------------------|
| <b>REAL ESTATE AGENCY</b> |   | <b>II. KEY MEASURE ANALYSIS</b> |
| <b>KPM #1</b>             | Compliance Rate Achieved - Percent of property managers/principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review. | 2013                            |
| <b>Goal</b>               | Consumer Protection - Provide quality protection for Oregon consumers of real estate related service  |                                 |
| <b>Oregon Context</b>     | N/A   |                                 |
| <b>Data Source</b>        | Oregon Real Estate Agency Regulations Division records - specifically an electronic follow-up survey to compliance review participants.               |                                 |
| <b>Owner</b>              | Selina Barnes, Regulations Division Manager, 503-378-4637   |                                 |



## 1. OUR STRATEGY

This measure was developed in response to legislative direction by Budget Note, to create a measure that assesses the Agency's strategies for licensee improvement through compliance rather than simply audit count. The Agency created this measure as a response to this direction. Through this measure, the

# BUDGET NARRATIVE

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|                           |                                 |
|---------------------------|---------------------------------|
| <b>REAL ESTATE AGENCY</b> | <b>II. KEY MEASURE ANALYSIS</b> |
|---------------------------|---------------------------------|

Agency aims to focus its resources on opportunities to bring property managers and principal brokers who participate in the review into compliance with the real estate rules and laws.

## 2. ABOUT THE TARGETS

The target of 90% was identified as the baseline for the first year of reporting. A higher percentage of compliance by property managers and principal brokers is desired.

## 3. HOW WE ARE DOING

For 2014, 69% of those property managers and principal brokers who completed the compliance review process, including the follow-up survey, came into compliance within 45 days of the review completion.

## 4. HOW WE COMPARE

The Agency reviewed the KPMs of other state regulatory agencies in Oregon and found no comparable measures.

## 5. FACTORS AFFECTING RESULTS

For 2014, the participants were not forewarned that they wouldn't complete the compliance review process until a follow-up survey was submitted. Because the data for this measure relied on the respondent's completion of the entire review process, a very low response rate occurred. In fact, only 16 real estate licensees completed the entire review. For 2015, it was made very clear during the initial email, that in order to complete this process, respondents must submit the follow-up survey. To date, 100% of those respondents meet compliance after 45 days from the review.

## 6. WHAT NEEDS TO BE DONE

The Regulations Manager, along with the Commissioner and Deputy Commissioner, are considering options for improving or phasing out this program. Currently, participation in the compliance review process is completely voluntary. Respondents self-report their compliance with the Agency's rules and laws. The Agency has no way to verify the accuracy of how respondents report. There is also a very low percentage completion rate compared to how many invitations for participation in the compliance review process are sent out (average of 15% participation out of total invitations). Options that are currently under consideration for the program include making participation mandatory or redirecting the resources to focus on the audits of Clients' Trust Accounts.

# BUDGET NARRATIVE

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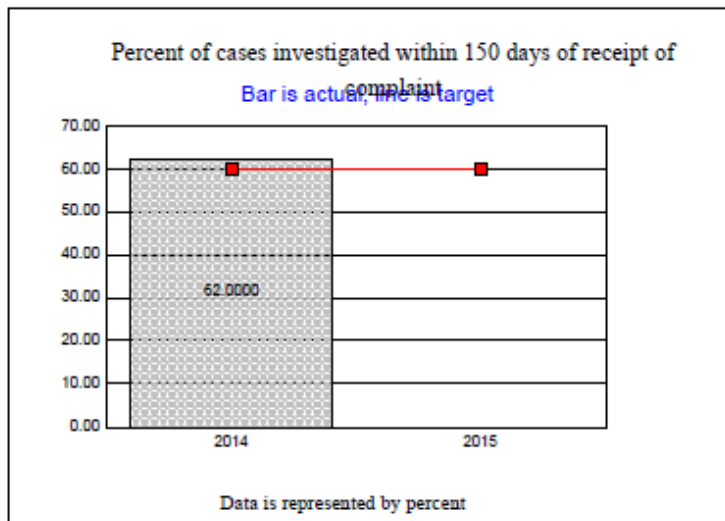
|                    |                          |
|--------------------|--------------------------|
| REAL ESTATE AGENCY | II. KEY MEASURE ANALYSIS |
|--------------------|--------------------------|

## 7. ABOUT THE DATA

This data is being reported on the Oregon Fiscal Year basis.

# BUDGET NARRATIVE

|                    |  |                          |
|--------------------|--|--------------------------|
| REAL ESTATE AGENCY |  | II. KEY MEASURE ANALYSIS |
| KPM #2             | Percent of investigations completed within 150 days of receipt of complaint.                         | 2000                     |
| Goal               | Consumer Protection - Provide quality protection for Oregon consumers of real estate related service |                          |
| Oregon Context     | N/A  |                          |
| Data Source        | Oregon Real Estate Agency, Regulation Division records.  |                          |
| Owner              | Selina Barnes, Regulations Division Manager, 503-378-4637  |                          |



## 1. OUR STRATEGY

Regulations Division investigators focus solely on investigations. This work includes gathering all information necessary (including identifying and reviewing documents and interviewing witnesses), writing a detailed investigative report and submitting the case to the Regulations Manager for review. The Agency will continue to hire, support, train and retain investigation staff.

# BUDGET NARRATIVE

## REAL ESTATE AGENCY

## II. KEY MEASURE ANALYSIS

### 2. ABOUT THE TARGETS

The measure was modified from the former measure: "Average Number of Days to Complete an Investigation". The modification is more useful in improving investigation timeliness. The target was selected through research of similarly charged state agencies (as well as licensing/regulatory entities outside of Oregon). The target is the same as is used by the Oregon State Board of Nursing for a similar measure. The target is being monitored for appropriateness as this measure is tracked by the Regulations Manager and the Commissioner on a regular basis. However, delays in receiving responses from witnesses, needed documents, and cooperation by some, as well as the complexity of the involved issues, results in a lengthier process in some cases.

### 3. HOW WE ARE DOING

Historically, the Agency reported the "Average Number of Days to Complete an Investigation". The Agency continues to monitor its outcome under both measures and acknowledges the value of considering the results of both "Average Days" and the "Percent of Cases". The Agency met its performance target for FY 2014. During FY 2014, the Agency completed 62% of cases within 150 days. The Agency's results have also improved drastically under the "Average Days" measure. The average number of days to complete an investigation was 128 days in FY 2013 and 130 days in FY 2014. To provide some historical perspective, it was taking the Agency an average of 212 days to complete an investigation in FY 2010 and 267 days to complete an investigation in FY 2011. Again, the Agency's performance in this area has drastically improved.

### 4. HOW WE COMPARE

National context: The Association of Real Estate Licensing and Law Officials (ARELLO's) Digest of Real Estate License Laws provides comparative complaint data for all states and other real estate licensing jurisdictions, but does not include data regarding the length of investigations. State context: The Oregon Board of Nursing (OBN) has been reporting on a very similar measure for many years: "Percent of cases investigated and referred to Board within 120 days of receipt of complaint." The target used by the OBN is the same as was selected by the Agency: 60%, however the number of days goal is slightly less. From 2005-08 the BON investigated between 30-40% of cases within the target. However, since 2009, they exceeded their target every year.

### 5. FACTORS AFFECTING RESULTS

Retaining adequate staffing for investigations is an ongoing issue. Staff with the knowledge and expertise to investigate cases with the content of financial and real estate transaction complexity is vital to continuing to meet the performance measure. The Agency also has difficulty with recruiting for these positions due to specificity in the minimum qualifications. There are also factors outside of the Agency's control, such as, unavailable witnesses or information that contribute to lengthier investigations. The Regulations Division is fully staffed for the first time in several years.

### 6. WHAT NEEDS TO BE DONE

This measure helps guide workload distribution. Certain types of investigations may require a longer period of time to complete. There may also be cases that have been in process for a longer period of time due to unavailability of information or witnesses, or due to the large number of witnesses and the complexity of the issues involved. The manager cannot necessarily assume that all cases take close to the same amount of time. However, tracking the time to complete investigations could more closely align the types of investigations with the expertise of the investigators. It can also highlight the areas that cause a stall in the process and help with an effective resolution.

# BUDGET NARRATIVE

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|                    |                          |
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| REAL ESTATE AGENCY | II. KEY MEASURE ANALYSIS |
|--------------------|--------------------------|

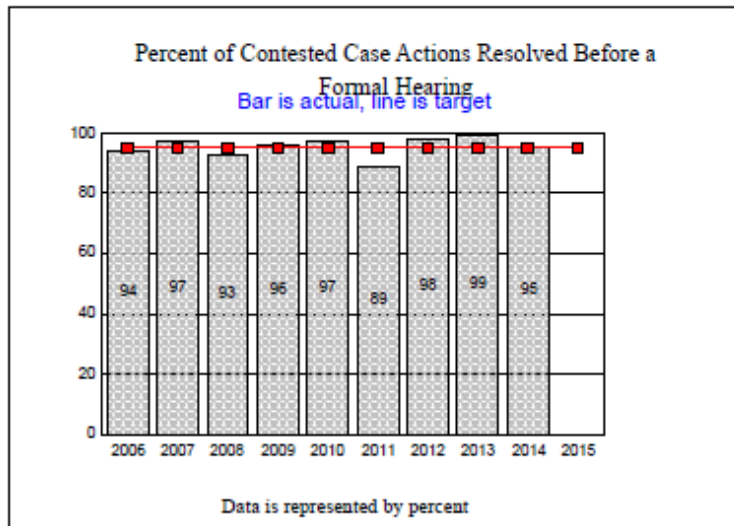
## 7. ABOUT THE DATA

This data is being reported on the Oregon Fiscal Year basis.



# BUDGET NARRATIVE

|                       |   |                          |
|-----------------------|---|--------------------------|
| REAL ESTATE AGENCY    |   | II. KEY MEASURE ANALYSIS |
| <b>KPM #3</b>         | Contested Case Actions resolved through settlement – percent of contested case actions that are resolved through informal settlement resolution and prior to a formal hearing before the Office of Administrative Hearings. | 2006                     |
| <b>Goal</b>           | Excellent Customer Service  |                          |
| <b>Oregon Context</b> | N/A   |                          |
| <b>Data Source</b>    | Regulation's Division statistics - total settled contested case actions to total contested case actions   |                          |
| <b>Owner</b>          | Selina Barnes, Regulations Division Manager, 503-378-4637   |                          |



## 1. OUR STRATEGY

Continue promoting case resolution through settlement process.

# BUDGET NARRATIVE

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|                           |                                 |
|---------------------------|---------------------------------|
| <b>REAL ESTATE AGENCY</b> | <b>II. KEY MEASURE ANALYSIS</b> |
|---------------------------|---------------------------------|

## 2. ABOUT THE TARGETS

The measure was added in 2005 and a target of 95% was set for FY 2006 through 2009. The administrative hearing process is expensive and lengthy and overall impacts other regulatory services. Efficient resolution of disciplinary actions saves both sides of the regulatory action the time and enormous expense of attorney representation in preparation for and attendance at a hearing. The Agency realizes that a prudent measure leaves room for those cases where a hearing is strongly desired by the respondent.

## 3. HOW WE ARE DOING

The Agency continues to meet its performance target of 95% for this measure. In FY 2012, 98% of contested cases were settled without a hearing which exceeded the Agency's target (in FY 2013, the Agency achieved a 99% result). In FY 2014, 95% of contested cases were settled without the hearings process (97% were resolved without a formal hearing taking place), which meets the Agency's target.

## 4. HOW WE COMPARE

The Board of Accountancy has a similar performance measure (CONTESTED CASES RESOLVED BY CONSENT- Percentage of contested cases resolved by consent agreement prior to formal hearing). Their current target is 60%, and the actual was 87% in 2012 and 100% in 2013. They are raising their target to 75%, beginning this fiscal year.

## 5. FACTORS AFFECTING RESULTS

The Agency continues to value the importance of the settlement process in the resolution of disciplinary actions. The respondent has the opportunity to meet with the Regulations Division Manager after each investigation is complete to go through the settlement process. This allows each party to better understand each other, thus improving the number of cases settled without a formal administrative hearing. A higher number of cases that are taken to the formal hearing process would require training additional staff in the preparation and administrative functions necessary to represent the Agency. This would also increase costs to the Agency significantly for each hearing as well as increased workload for the Office of Administrative Hearings. However, it is not uncommon for respondents to decline a settlement agreement because they want the opportunity to present their position in a formal administrative hearing.

## 6. WHAT NEEDS TO BE DONE

The Agency needs to maintain efforts to propose disciplinary actions that are an appropriate resolution for the regulation of the statutes and administrative rules that OREA is responsible for, whether the resolution is through a settlement agreement or by an administrative hearing.

## 7. ABOUT THE DATA

# BUDGET NARRATIVE

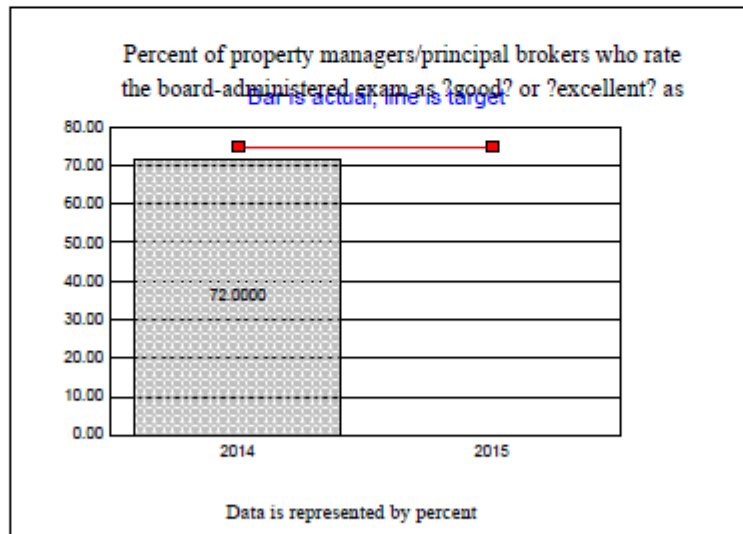
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|                    |                          |
|--------------------|--------------------------|
| REAL ESTATE AGENCY | II. KEY MEASURE ANALYSIS |
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This data is being reported on the Oregon Fiscal Year basis.

# BUDGET NARRATIVE

|                           |  |                                 |
|---------------------------|--|---------------------------------|
| <b>REAL ESTATE AGENCY</b> |  | <b>II. KEY MEASURE ANALYSIS</b> |
| <b>KPM #4</b>             | Percent of licensees who rate the board-administered exam as “good” or “excellent” as an effective screen for competent and ethical professionals.   | 2013                            |
| <b>Goal</b>               | Provide excellent customer service and consumer protection.  |                                 |
| <b>Oregon Context</b>     | N/A  |                                 |
| <b>Data Source</b>        | The Agency has pre-defined an automatic email event to select licensees (brokers, principal brokers, and property managers) who have been licensed for six months to receive an email with a link to this survey. The survey data is currently housed in Survey Monkey. Also included on the survey are questions about education providers. |                                 |
| <b>Owner</b>              | Stacey Harrison, Education Division Manager, 503-378-4585  |                                 |



## 1. OUR STRATEGY

# BUDGET NARRATIVE

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|                           |                                 |
|---------------------------|---------------------------------|
| <b>REAL ESTATE AGENCY</b> | <b>II. KEY MEASURE ANALYSIS</b> |
|---------------------------|---------------------------------|

The Agency will continue to work with its examination vendor and review all test questions for clarity. In addition, the Agency will continue to review education materials with the Real Estate Board and licensees for content. The Agency will use the responses from this survey to evaluate the performance of its licensing test questions and its examination vendor.

## 2. ABOUT THE TARGETS

The target of 75% was identified as the baseline for the first year of reporting. A higher percentage of "good" or "excellent" responses is desired.

## 3. HOW WE ARE DOING

For 2014, 72% of licensees rated the examination as "good" or "excellent" as an effective screen for competent and ethical professionals.

## 4. HOW WE COMPARE

The Agency reviewed the KPMs of similarly charged state licensing and regulatory agencies in Oregon and found no measures of the effectiveness of licensing examinations.

## 5. FACTORS AFFECTING RESULTS

Licensees who have failed the examination tend to express negative responses to survey questions related to the examination. The Agency also suspects that licensees are more prone to provide a lower rating of the examination if they were not fully satisfied with their pre-license education provider.

## 6. WHAT NEEDS TO BE DONE

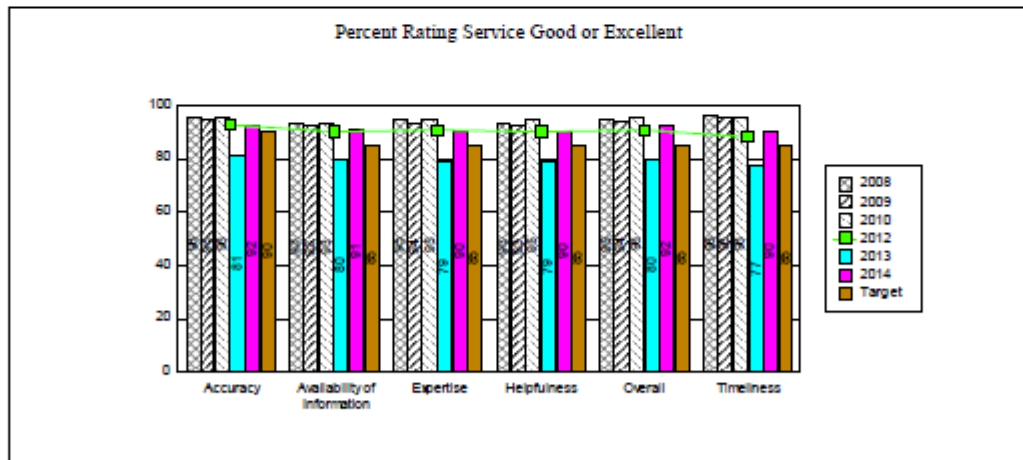
The Agency will look at methods of ensuring all pre-license education is current. The Agency will also meet periodically with its examination vendor and the Board to improve the examinations by reviewing the test items for both accuracy and relevance.

## 7. ABOUT THE DATA

This data is being reported on the Oregon Fiscal Year basis.

# BUDGET NARRATIVE

|                           |   |                                 |
|---------------------------|---|---------------------------------|
| <b>REAL ESTATE AGENCY</b> |   | <b>II. KEY MEASURE ANALYSIS</b> |
| <b>KPM #5</b>             | CUSTOMER SERVICE – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.  | 2006                            |
| <b>Goal</b>               | To improve customer satisfaction through excellent customer service.  |                                 |
| <b>Oregon Context</b>     | N/A   |                                 |
| <b>Data Source</b>        | The Agency’s Business and Licensing Services Manager sends the customer satisfaction survey to its licensees (brokers, principal brokers, and property managers) by email after they’ve renewed their license in eLicense (approximately 800 per month). The Agency maintains an active email address for all licensees. Beginning in 2013, the surveys were also electronically sent to every person who had submitted an inquiry to the Agency’s general email inbox ( <a href="mailto:orea_info@state.or.us">orea_info@state.or.us</a> ). Historically the Agency didn’t follow-up with this population, however the effort was started in order to expand and diversify the pool of survey respondents. |                                 |
| <b>Owner</b>              | Erica Kleiner, Business and Licensing Services Division Manager, 503-378-4409   |                                 |



## 1. OUR STRATEGY

# BUDGET NARRATIVE

## REAL ESTATE AGENCY

## II. KEY MEASURE ANALYSIS

The Agency is committed to providing its licensing services electronically and licensees are encouraged to manage their licenses online . They can submit applications, change information, make payments, check their statuses, etc. all online without having to call the Agency. The Agency is committed to providing customer assistance and support to licensees and the public when needed. The surveys help the Agency to determine areas of strength and needed improvement. The survey responses are monitored on a weekly basis and requests for follow-up are fulfilled immediately. The results of the customer satisfaction survey are also shared with upper management on a monthly basis.

### 2. ABOUT THE TARGETS

Based on initial results of this measure, targets are set at 85%, with the exception of Accuracy, where the expectations will continue to be 90%. The Agency does strive to achieve a 100% result in the "good" or "excellent" categories when it comes to customer service.

### 3. HOW WE ARE DOING

The "good" and "excellent" responses decreased slightly across response categories in FY 2013. However, they improved in FY 2014. The Agency suspects the drop in response rates occurred in 2013 due to two factors: one being the implementation of the eLicense system and the dramatic changes to the Agency's licensing processes and the second being that prior to 2013, the Agency didn't solicit input from individuals that contacted the Agency with issues through its main inbox ([orea\\_info@state.or.us](mailto:orea_info@state.or.us)). Some individuals prefer a more manually run licensing process, allowing them to submit paper application forms and physical payments. Licensees have adjusted to the new system. They generally appreciate the flexibility and reduced processing times that the online system enables them. The Agency will continue to refine the electronic system in order to improve the user experience. In fact, the Agency will be launching a new version in early 2015, which will drastically improve the "look and feel" of the eLicense system. The goal with sending the customer satisfaction surveys to individuals who contacted the Agency through its main inbox, was to diversify the pool of survey respondents. Generally these are individuals who have some type of "issue" with either a licensing process or the Agency in general. Or they are contacting the Regulations Division with a questions. The Agency felt that only surveying individuals who had successfully renewed their licenses was not fully transparent, and may have skewed the results. Again, this diversifies the pool from which the Agency solicits input from. The Agency expects that its results will continue to improve over the next two years.

### 4. HOW WE COMPARE

Since this is a standardized measure, the Agency surveyed the results of other similarly charged state agencies in Oregon and the averages of the results achieved by these agencies are comparable to the results achieved by OREA across the categories in FY 2014.

### 5. FACTORS AFFECTING RESULTS



# BUDGET NARRATIVE

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| REAL ESTATE AGENCY | II. KEY MEASURE ANALYSIS |
|--------------------|--------------------------|

Real estate licensees are, in general, mindful of regulatory requirements and seek information both on the website and from Agency staff. Office policies and procedures encourage staff members to provide excellent customer service in the performance of their duties. Investment by the Agency in customer service trainings is made on an annual basis.

## 6. WHAT NEEDS TO BE DONE

The Agency will continue to solicit input regarding how to improve its electronic licensing system. Agency management will also continue to follow-up with any individual who contacts the Agency through its main email inbox within a one week period.

## 7. ABOUT THE DATA

This data is being reported on the Oregon Fiscal Year basis.



# BUDGET NARRATIVE

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|---|---|
| <b>REAL ESTATE AGENCY</b>   | <b>III. USING PERFORMANCE DATA</b>  |
| <b>Agency Mission:</b> To provide quality protection for Oregon consumers of real estate, escrow and land development services, balanced with a professional environment conducive to a healthy real estate market. |   |
| <b>Contact:</b> Erica Kleiner   | <b>Contact Phone:</b> 503-378-4409  |
| <b>Alternate:</b>   | <b>Alternate Phone:</b>   |
| <b>The following questions indicate how performance measures and data are used for management and accountability purposes.</b>  |   |
| <b>1. INCLUSIVITY</b>   | <ul style="list-style-type: none"> <li>* <b>Staff :</b> Assists with regular review of performance measure results and development of meaningful measures.</li> <li>* <b>Elected Officials:</b> Provide input and approve key performance measures through DAS and Legislative members.</li> <li>* <b>Stakeholders:</b> Assists the Agency in setting realistic goals and directing the content of the performance measures by providing feedback through general discussions.</li> <li>* <b>Citizens:</b> The Agency also provides opportunity for feedback through phone contact and via email, analyzing the information provided to determine the Agency's performance achievements.</li> </ul> |
| <b>2 MANAGING FOR RESULTS</b>   | Agency management tracks performance measures quarterly and some are tracked monthly. Results are communicated to Agency staff through the Agency's intranet. Management solicits input from staff on performance goal achievement, and takes into account the feedback from staff that will help strengthen the performance of the Agency. Managers make decisions to allocate resources, both staff time and funding, based on quarterly results. The Agency will closely examine performance measures to determine if they are accurately measuring the impact of the Agency's business practices with the interest of government and key stakeholders.  |
| <b>3 STAFF TRAINING</b>   | In the past year, staff have been trained on how to use eLicense. The Licensing Specialists have had in-house training on providing excellent customer service, and employee position descriptions include customer service as a primary function and responsibility. The Agency and each division within the Agency has set customer service standards.  |
| <b>4 COMMUNICATING RESULTS</b>  | * <b>Staff :</b> Performance measurements are a frequent topic of discussion, both directly and indirectly, during management, division, and staff meetings to assure compliance with the initiatives. The Regulation Division Manager and the Business and Licensing Services Manager both discuss division workload at the division staff meetings, and process improvement suggestions are continuously encouraged. Division staff meet as needed to discuss workload and process improvement.   |

# BUDGET NARRATIVE

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\* **Elected Officials:** The Agency includes the Annual Performance Progress Report in each budget document for review by elected officials.

\* **Stakeholders:** The Agency will include the annual progress report each year on the Agency website in order to solicit feedback from the industry and the consumer. The report will be provided to the Oregon Real Estate Board biennially for their review and input.

\* **Citizens:** The Agency's performance measures and annual report are posted on the Agency's website:  
<http://www.rea.state.or.us>.

# BUDGET NARRATIVE

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