

# **OREGON REAL ESTATE AGENCY**



## **2019-2021 GOVERNOR'S BALANCED BUDGET**

**OREGON REAL ESTATE AGENCY  
2019-21 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

530 Center St. NE Ste 100 Salem, OR 97301

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**AGENCY NAME**

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**AGENCY ADDRESS**

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**SIGNATURE**

Real Estate Commissioner

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**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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79th Oregon Legislative Assembly – 2017 Regular Session

HB 5037 A BUDGET REPORT and MEASURE SUMMARY

Carrier: Sen. Monroe

Joint Committee On Ways and Means

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Action Date: 04/14/17

Action: Do pass the A-Eng bill.

Senate Vote

Yeas: 11 - Devlin, Frederick, Girod, Hansell, Johnson, Manning Jr, Monroe, Roblan, Steiner Hayward, Thomsen, Winters

Exc: 1 - DeBoer

House Vote

Yeas: 9 - Gomberg, Holvey, McLane, Nathanson, Smith G, Smith Warner, Stark, Whisnant, Williamson

Exc: 2 - Huffman, Rayfield

Prepared By: Robert Otero, Department of Administrative Services

Reviewed By: Michelle Deister, Legislative Fiscal Office

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Real Estate Agency  
2017-19

HB 5037 A

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# BUDGET NARRATIVE

## Budget Summary\*

|                     | 2015-17 Legislatively<br>Approved Budget (1) | 2017-19 Current Service<br>Level | 2017-19<br>Committee<br>Recommendation | Committee Change from<br>2015-17 Leg. Approved |          |
|---------------------|--|----------------------------------|--|--|----------|
|                     |  |                                  |  | \$ Change                                      | % Change |
| Other Funds Limited | \$ 7,166,423                                 | \$ 7,898,615                     | \$ 7,898,615                           | \$ 732,192                                     | 10.2%    |
| Total               | \$ 7,166,423                                 | \$ 7,898,615                     | \$ 7,898,615                           | \$ 732,192                                     | 10.2%    |

## Position Summary

|                                      |       |       |       |      |
|--------------------------------------|-------|-------|-------|------|
| Authorized Positions                 | 29    | 29    | 29    | 0    |
| Full-time Equivalent (FTE) positions | 29.00 | 29.00 | 29.00 | 0.00 |

(1) Includes adjustments through December 2016

\* 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 and from publication fees. The Committee's recommended budget will leave a projected ending balance of approximately three months of operating expenses. Over a decade has passed since the Real Estate Agency last instituted a comprehensive fee increase in 1997. The user-specific fees were increased to cover inflationary costs and staff time associated with the provision of particular services. The Real Estate Agency collaborated with stakeholders over the course of the 2015-17 biennium to gather input, develop the new fee schedule and to inform licensees about the timing and reasons behind the fee proposal.

Senate Bill 68 (2017) increases fees imposed by the Oregon Real Estate Agency and established new fees. Senate Bill 68 (2017) is estimated to generate \$2.2 million in additional revenue to the Real Estate Agency for the 2017-19 biennium and an estimated ending balance of approximately three months. The approved fee increases in Senate Bill 68 (2017) are for:

- License Applications from \$230 to \$300
- Active License Renewal from \$230 to \$300
- Inactive License Renewal from \$110 to \$150
- Late Renewal Fee from \$30 to \$150
- Reactivation Fee from \$75 to \$150
- Business Name Registration Fee from \$230 to \$300
- Branch Office Registration Fee from \$10 to \$50
- Escrow Renewal Fee from \$300 to \$450
- Escrow Branch Office Renewal from \$150 to \$225
- Temporary License Fee from \$40 to \$150
- Temporary License Extension Fee from \$40 to \$150
- Registered Business Name Renewal Fee established at \$50
- Registered Business Name Change Fee established at \$300
- Continuing Education Provider Application established at \$300

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# BUDGET NARRATIVE

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- Escrow Application Fee from \$300 to \$450
- Escrow Branch Office Application from \$150 to \$225
- Continuing Education Provider Renewal established at \$50

## **Summary of Transportation and Economic Development Subcommittee Action**

Senate Bill 5037 (2017) is the budget bill for the Oregon Real Estate Agency. The agency is responsible for licensing, continuing education and the enforcement of Oregon's real estate laws applicable to brokers, property managers and real estate firms. The Subcommittee approved a budget of \$7,898,615 Other Funds and 29.00 full-time equivalent positions for 2017-19, which is a 10.2 percent increase from the 2015-17 Legislatively approved spending level.

The Subcommittee approved the following recommendation:

- Package 070, Revenue Shortfall - includes Other Funds expenditure reductions necessary to balance expenditures to existing, current law revenues. The package reduces Other Funds limitation by (\$1,310,673) and eliminates six positions (6.00 FTE).
- Package 101, OREA Fee Increase - adds back the six permanent full-time positions and associated expenditures related to package 070, with approval of Senate Bill 68 (2017). In addition, the package includes approximately \$2.2 million in additional revenue.

## **Summary of Performance Measure Action**

See attached Legislatively Adopted 2017-19 Key Performance Measures form.

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# BUDGET NARRATIVE

## DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

Oregon Real Estate Agency  
Robert Otero--503-983-8670

| DESCRIPTION   | GENERAL FUND | LOTTERY FUNDS | OTHER FUNDS         |             | FEDERAL FUNDS |             | TOTAL ALL FUNDS     | POS       | FTE          |
|---|--------------|---------------|---------------------|-------------|---------------|-------------|---------------------|-----------|--------------|
|   |              |               | LIMITED             | NONLIMITED  | LIMITED       | NONLIMITED  |                     |           |              |
| 2015-17 Legislatively Approved Budget at Dec 2016 * | \$ -         | \$ -          | \$ 7,166,423        | \$ -        | \$ -          | \$ -        | \$ 7,166,423        | 29        | 29.00        |
| 2017-19 Current Service Level (CSL)*                | \$ -         | \$ -          | \$ 7,898,615        | \$ -        | \$ -          | \$ -        | \$ 7,898,615        | 29        | 29.00        |
| <b>SUBCOMMITTEE ADJUSTMENTS (from CSL)</b>          |              |               |                     |             |               |             |                     |           |              |
| <b>SCR 050 - Real Estate Agency</b>                 |              |               |                     |             |               |             |                     |           |              |
| Package 070: Revenue Shortfalls                     |              |               |                     |             |               |             |                     |           |              |
| Personal Services                                   | \$ -         | \$ -          | \$ (1,066,114)      | \$ -        | \$ -          | \$ -        | \$ (1,066,114)      | (6)       | (6.00)       |
| Services and Supplies                               | \$ -         | \$ -          | \$ (244,559)        | \$ -        | \$ -          | \$ -        | \$ (244,559)        |           |              |
| Package 101: OREA Fee Increase                      |              |               |                     |             |               |             |                     |           |              |
| Personal Services                                   | \$ -         | \$ -          | \$ 1,066,114        | \$ -        | \$ -          | \$ -        | \$ 1,066,114        | 6         | 6.00         |
| Services and Supplies                               | \$ -         | \$ -          | \$ 244,559          | \$ -        | \$ -          | \$ -        | \$ 244,559          |           |              |
| <b>TOTAL ADJUSTMENTS</b>                            | <b>\$ -</b>  | <b>\$ -</b>   | <b>\$ -</b>         | <b>\$ -</b> | <b>\$ -</b>   | <b>\$ -</b> | <b>\$ -</b>         | <b>0</b>  | <b>0.00</b>  |
| <b>SUBCOMMITTEE RECOMMENDATION *</b>                | <b>\$ -</b>  | <b>\$ -</b>   | <b>\$ 7,898,615</b> | <b>\$ -</b> | <b>\$ -</b>   | <b>\$ -</b> | <b>\$ 7,898,615</b> | <b>29</b> | <b>29.00</b> |
| % Change from 2015-17 Leg Approved Budget           | 0.0%         | 0.0%          | 10.2%               | 0.0%        | 0.0%          | 0.0%        | 10.2%               | 0.0%      | 0.0%         |
| % Change from 2017-19 Current Service Level         | 0.0%         | 0.0%          | 0.0%                | 0.0%        | 0.0%          | 0.0%        | 0.0%                | 0.0%      | 0.0%         |

\*Excludes Capital Construction Expenditures

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# BUDGET NARRATIVE

## Legislatively Approved 2017 - 2019 Key Performance Measures

Published: 4/10/2017 5:13:13 PM

Agency: Real Estate Agency

**Mission Statement:**

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 Approved KPMs   | Metrics                     | Agency Request | Last Reported Result | Target 2018 | Target 2019 |
|---|-----------------------------|----------------|----------------------|-------------|-------------|
| 1. Compliance Rate Achieved - Percent of property managers/principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review.  |                             | Approved       | 100%                 | 90%         | 90%         |
| 2. Percent of investigations completed within 150 days of receipt of complaint.   |                             | Approved       | 78%                  | 60%         | 60%         |
| 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       | 87%                  | 95%         | 95%         |
| 4. Percent of licensees who rate the board-administered exam as "good" or "excellent" as an effective screen for competent and ethical professionals.   |                             | Approved       | 64%                  | 75%         | 75%         |
| 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       | 90%                  | 85%         | 85%         |
|   | Overall                     |                | 91%                  | 85%         | 85%         |
|   | Timeliness                  |                | 86%                  | 85%         | 85%         |
|   | Accuracy                    |                | 92%                  | 85%         | 85%         |
|   | Expertise                   |                | 88%                  | 85%         | 85%         |
|   | Helpfulness                 |                | 85%                  | 85%         | 85%         |

**LFO Recommendation:**

The Legislative Fiscal Office recommends Key Performance Measures and targets as presented.

As discussed in the Ways and Means Subcommittee on Transportation and Economic Development, depending on the nature of disciplinary cases, the agency may continue to miss the target for KPM #3. In the most recent reporting year, there were few agency investigations that moved to the contested case phase, and some of those that did were more egregious cases of misconduct, which the Commissioner did not find to be suitable candidates for settlement.

To address concerns brought forward by the agency related to KPM #4 - specifically that new licensee survey responses seem to emphasize the course and exam preparation for how to operate a real estate business, rather than responding to the agency's emphasis on course and exam preparation regarding ethics, it is recommended that the agency survey new licensees sooner than current practice.

**SubCommittee Action:**

The Transportation and Economic Development Subcommittee approved the Legislative Fiscal Office recommendation.

# BUDGET NARRATIVE

## Real Estate Agency

### Governor's Balanced Budget Comparison

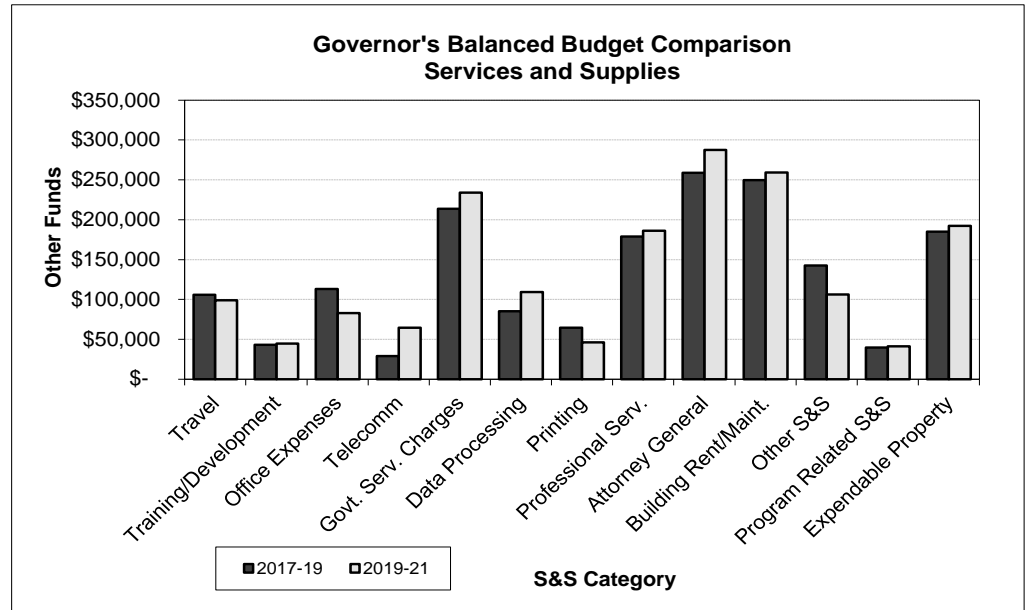
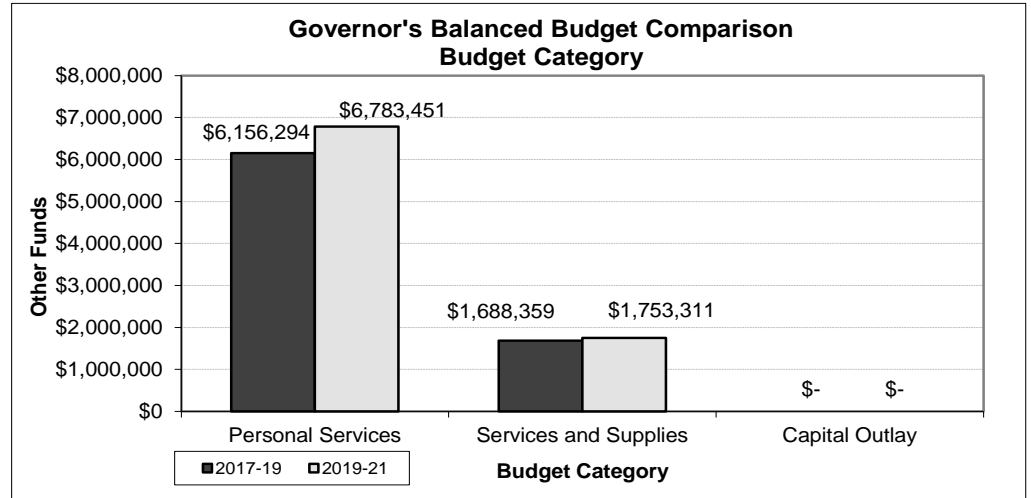
(All Other Funds)

#### Budget Category

|                       | 2017-19          | 2019-21          | Difference     |
|-----------------------|------------------|------------------|----------------|
| Personal Services     | \$ 6,156,294     | \$ 6,783,451     | \$ 627,157     |
| Services and Supplies | \$ 1,688,359     | \$ 1,753,311     | \$ 64,952      |
| Capital Outlay        | \$ -             | \$ -             | \$ -           |
| <b>Total</b>          | <b>7,844,653</b> | <b>8,536,762</b> | <b>692,109</b> |

#### Services and Supplies

|                       | 2017-19             | 2019-21             | Difference       |
|-----------------------|---------------------|---------------------|------------------|
| Travel                | \$ 105,718          | \$ 98,762           | \$ (6,956)       |
| Training/Development  | \$ 43,104           | \$ 44,742           | \$ 1,638         |
| Office Expenses       | \$ 113,231          | \$ 83,040           | \$ (30,191)      |
| Telecomm              | \$ 29,024           | \$ 64,621           | \$ 35,597        |
| Govt. Serv. Charges   | \$ 213,555          | \$ 233,898          | \$ 20,343        |
| Data Processing       | \$ 85,296           | \$ 109,297          | \$ 24,001        |
| Printing              | \$ 64,598           | \$ 46,293           | \$ (18,305)      |
| Professional Serv.    | \$ 178,828          | \$ 186,339          | \$ 7,511         |
| Attorney General      | \$ 258,735          | \$ 287,624          | \$ 28,889        |
| Building Rent/Maint.  | \$ 249,644          | \$ 259,130          | \$ 9,486         |
| Other S&S             | \$ 142,627          | \$ 106,137          | \$ (36,490)      |
| Program Related S&S   | \$ 39,796           | \$ 41,308           | \$ 1,512         |
| Expendable Property   | \$ 185,087          | \$ 192,120          | \$ 7,033         |
| S & S - BAM Adjustmen | \$ (20,884)         | \$ -                | \$ -             |
| <b>Total</b>          | <b>\$ 1,688,359</b> | <b>\$ 1,753,311</b> | <b>\$ 64,952</b> |



# BUDGET NARRATIVE

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## REAL ESTATE AGENCY

### Agency Summary

The Oregon Real Estate Agency (OREA) licenses and regulates Oregon real estate professionals and administers the state level approval process for Oregon subdivisions, timeshares, membership campgrounds and condominiums.

### Mission Statement & Statutory Authority

The OREA mission 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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## 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 Real Estate Board is authorized to inquire into the needs of the real estate licensees of Oregon, the functions of the Real Estate Agency and the matter of the business policy thereof, to confer with and advise the Governor as to how the agency may best serve the state and the licensees, and to make recommendations and suggestions of policy to the agency as the board may deem beneficial and proper for the welfare and progress of the licensees and of the public and of the real estate business in Oregon. The board shall make recommendations to the agency about the manner and methods for conducting examinations. The board shall create or approve a real estate continuing education course for real estate licensees based on recent changes in real estate rule and law.

- Real Estate Agency Division

*Administrative Services Division*

*Education Program*

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. Managed by the Deputy Commissioner, the division strives to provide excellence in education related services for the Agency, including:

- Creating educational opportunities that meet the needs of the industry and the consumer;
- Researching and utilizing technology and other tools to effectively deliver information;
- Developing and implementing effective licensing examinations;

# BUDGET NARRATIVE

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- Developing and publishing educational information including website content, brochures, and publications

## Program Functions:

### Education Services:

- Coordinating the development and periodic review of real estate educational guidelines;
- Approving pre-license courses and instructors;
- Reviewing and approves post-license education courses, and
- Maintaining and promoting escrow education requirements.

### Examination Services:

- Coordinates the development and maintenance of examinations and test items.

### *Business Administration*

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; and
- Oversight of the Agency's Information Systems staff, who provide word, data processing, LAN administration, and telecommunications services.

### *Customer Service (Licensing & Compliance)*

- 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;

# BUDGET NARRATIVE

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- Certifying continuing education providers;
- Providing general reception and licensing information to the public.

## *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.

## BUDGET NARRATIVE

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- Attorneys representing members of the public, licensees, developers with questions on application of law or in matters of complaint and/or administrative sanction.
- 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 in Agency Request Budget for 2019-21 are \$8,586,773.

*FTE.* Full time equivalent positions authorized by the Agency's 2017-19 Legislative Adopted Budget – 29.00.

# BUDGET NARRATIVE

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## Agency Plans

### *2019-21 Short-term Agency Plan*

The Agency is continually seeking efficiencies in business process to optimize the effectiveness of our efforts within existing resources while maintaining the high quality of service provided to the public. Recently identified areas of opportunity include modernization of Land Development data processing and revenue receipting using the Agency eLicense system, Clients' Trust Account Reconciliation Review triage processing and the need to review Agency records retention policies.

In the initial launch of the online licensing and regulatory system, Agency management determined that the Land Development division was out of scope. This was the only section of the Agency that did not undergo business process evaluation by consultants and was left to continue maintaining existing practices at the 2012 launch of eLicense. In the years following, the Agency has identified opportunities and has begun the transition to digital processing of high volume transactions; moving from paper forms and documents to the online submission of digital forms directly transmitted to the online system. With the successful piloting of these activities the Agency seeks to continue the efforts to convert all business in this division to electronic processing and reach 100% online revenue receipting by the end of the 19-21 biennium.

Over the last several years the Agency has strengthened the effectiveness of the Clients' Trust Reconciliation Review program by increased and targeted training for compliance staff and the development of tools to more precisely identify critical areas of noncompliance. However the Agency fell short of internal goals to consistently review a robust volume within existing staff resources. In response the Agency has instituted a new process which reorganizes these efforts through triaging reconciliation reviews. This program now bridges the resources of the Administrative and the Regulation divisions by shifting the administrative level work downward and the compliance level work at the appropriate level. The document intake and initial correspondence is now administered by an administrative specialist in the customer service section. When all documents are received the completed reconciliation review package is moved to a compliance specialist in the customer service section who then conducts an initial review. As noncompliance issues related to the financial integrity of the account under review are identified the file is then elevated further to the Regulatory division which has the specialized training and expertise to investigate the matter thoroughly. Administering this program in such a way as to conduct the communication and document receipting work to administrative level staff has allowed the Agency to drastically increase the review volume from approximately 25 reviews per month to 100. This transition is still in its infancy but may prove as a model for creating efficiencies in other areas of business.

Finally, the Agency has identified the need to review existing Agency records retention practices and policies. The Agency has amassed an outsized cost for the records held by the Oregon Secretary of State in comparison to other state Agencies of similar size and business. In consultation with stakeholders and the Oregon Secretary of State Archivist, the Agency will be reviewing opportunities to digitize priority documents for more cost effective storage and efficient retrieval in addition to consider modifications to existing retention schedules.



# BUDGET NARRATIVE

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## *2021-27 Long-term Agency Plan*

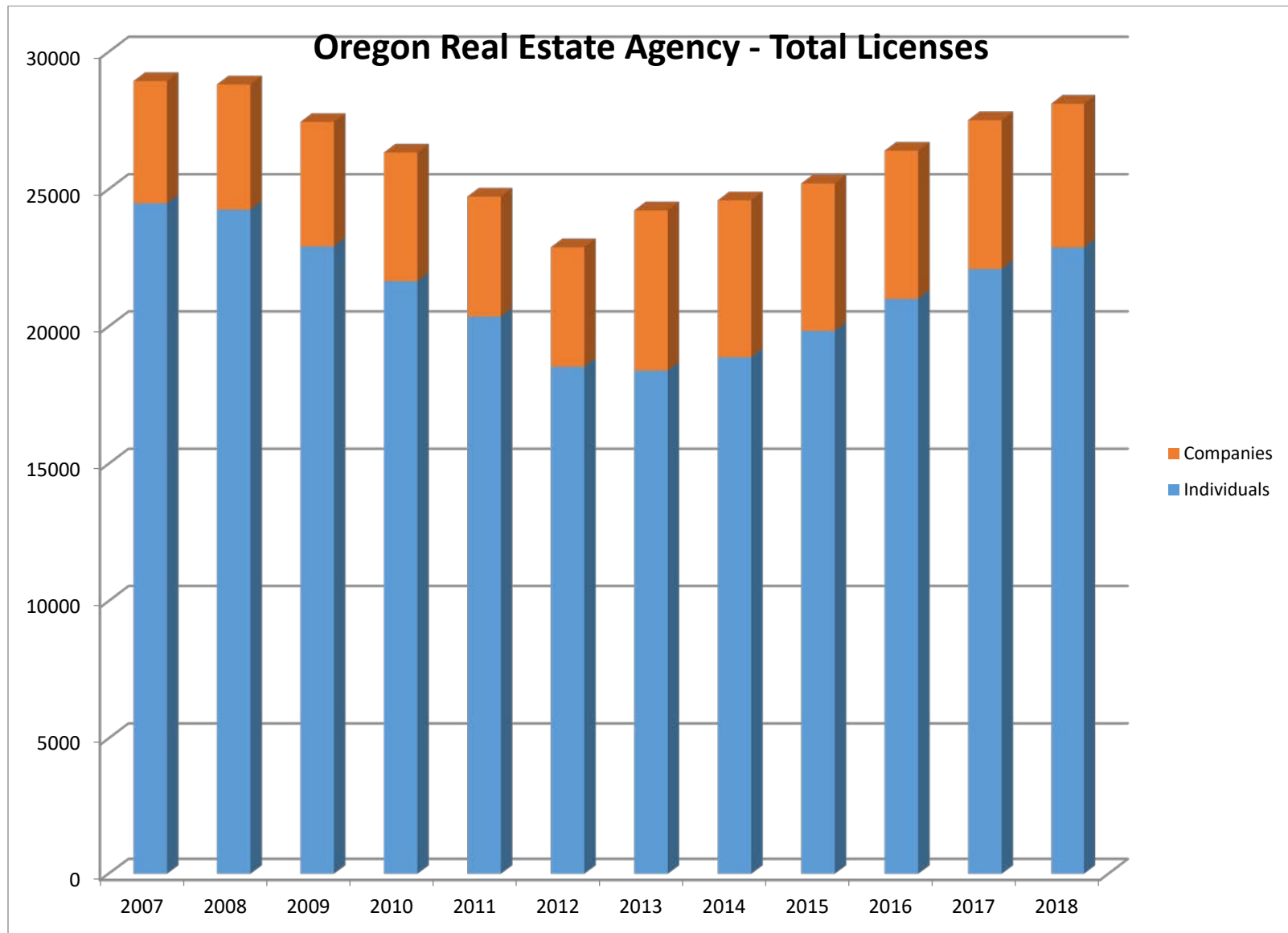
In the years following the 2008 market collapse the Agency reduced spending in all categories and operated off of the reserve cash balance. In the 2017 session the Agency received legislative approval for the first licensing fee increase in 20 years. The Agency had postponed the request to the latest point practical given the remaining reserve. Since the January 2018 implementation of the new fee structure the Agency reserve has begun to rebuild the cash reserve and expects to to endure the next market downturn while continuing to serve Oregon consumers.

### New Commissioner Objectives

#### Licensing System Replacement Planning

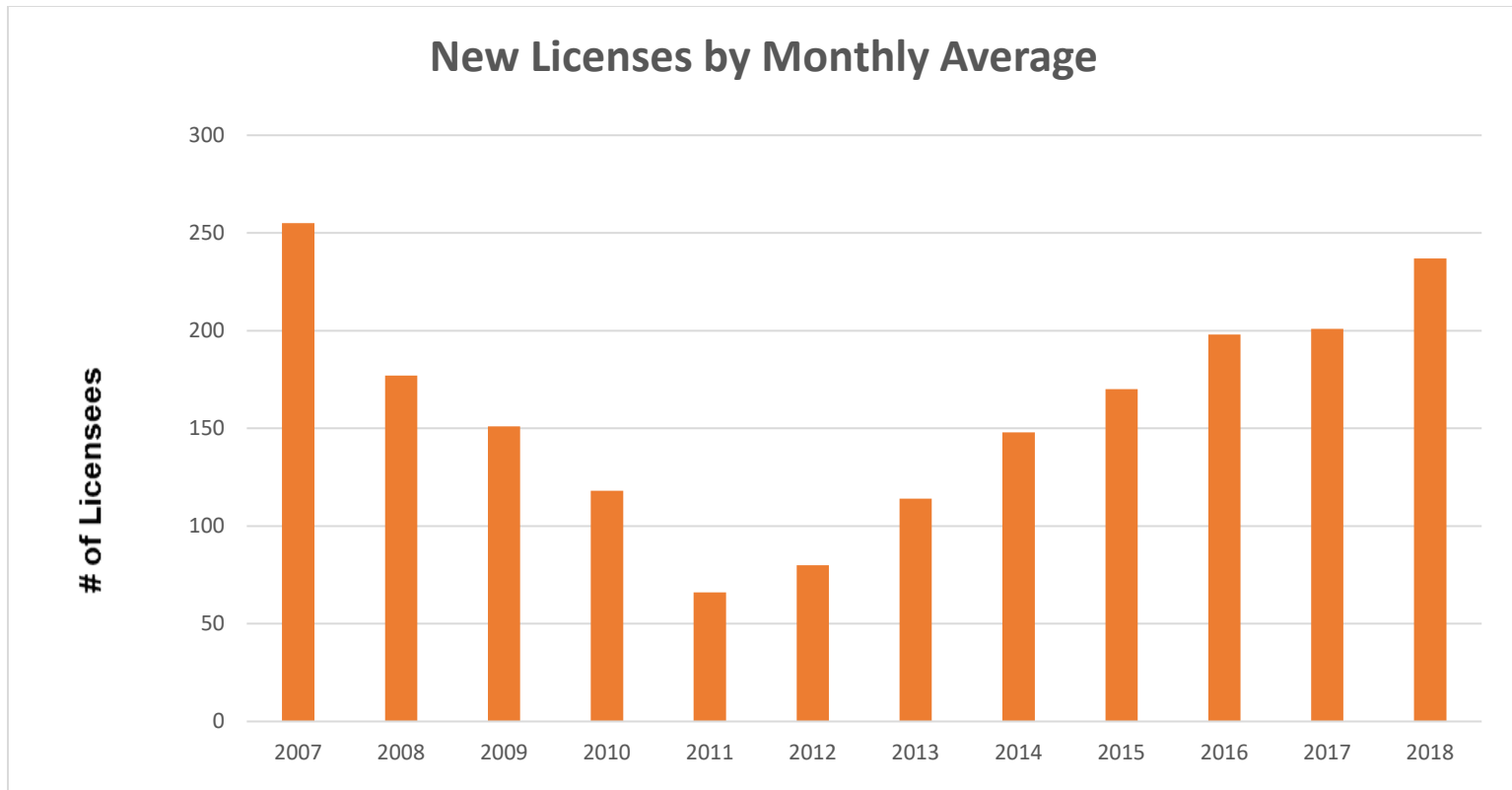
Long term, the Agency will advance its mission to provide quality protection for Oregon consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy real estate market. The Agency will do so by faithfully administering the laws and rules for which it is responsible: 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 across programs. In 2014, with the Department of Administrative Services and Legislative input, the Agency 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 is the percent of brokers, 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 is 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



# BUDGET NARRATIVE

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# BUDGET NARRATIVE

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## Environmental Factors

### *Industry Environment*

Economic indicators signal sustained near term strength in Oregon's real estate market. The state's economy is projected to maintain growth seen in recent years through the continued addition of new jobs and rising wages boding well for the industry. Real estate sales volume has been steady over the last few years but has not neared the peak seen in the mid-2000s. However Oregon rests it top three state position for in migration and home prices continue to steadily increase across the state. Affordability remains a concern, specifically in the Portland metro area posing a potential threat to more robust transaction volume. Though new construction and condominium filings are at the highest levels seen since the recession demonstrating that developers are aiming to deliver supply on current consumer demand.

The number of Oregon real estate licensees has steadily rebounded since reaching a post-recession low in December of 2012. As of July 2018 there are 23,000 individual licensees in Oregon, only 7% below the 2007 peak. The Agency projects a sustained but slower rate of growth in licensee counts over the next biennium. The average Oregon licensee is 51 years old and has been in practice for 5 years with only 6% of the licensee base allowing their license to lapse annually over the last two years. Oregon is a top in-migration state with a growing population and an active real estate market. With historically high home prices, supply constrain is currently an issue in population centers though building permits are up 22% over last year pointing to a potential relief for home buyers. Industry forecasts suggest a continued healthy market in the near term and support that real estate will continue to be an attractive profession to new entrants in Oregon over the next few years. The Agency expects to return to pre-recession licensee volume in the latter half next biennium.

License totals have shown a steady rebound since reaching the post-recession low point in 2011-2012. Indicators in several markets across the state signal continued near continued growth in the industry. Most cities have experienced a rise in median home price, a decrease in average days on the market, and an increase in new home permits. Buttressed by population growth in urban centers, and a robust economy, the real estate market in Oregon appears to be in an upcycle.

Although growth in the number of licenses is expected in the next year, it will likely continue at a more gradual rate than seen over the past five years and is projected to remain flat overall with the attrition of licensees existing the business. Under the current fee structure the Agency's 2017-19 revenue projection is conservative at approximately 6,314,305 Other Funds.

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

- Conventional mortgage rates have risen from 3.41 percent in July, 2016 to 4.19 percent in January, 2017.
- Home prices in Oregon have risen 11% over the preceding 12 months and are expected to continue to rise in 2017. Population growth and resultant supply constraints in Portland has contributed to the most dramatic price surge while other parts of the state have experienced a more restrained increase. Oregon is expected to observe an increase in home prices of 5% over the next year.

# BUDGET NARRATIVE

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- Rising home prices currently pose an obstacle to entry for first time buyers especially in the rapidly growing Portland metro region. However job growth and increasing wages coupled with a significant (19% previous 12 months) increase in new single family home permits as well as a swell in condominium development beckons greater affordability.
- As home prices continue to rise, more owners who had negative equity—meaning that they owed more on their mortgage than their home was worth—will emerge from the sidelines and start selling and buying homes.

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

## **Administrative Environment**

Senate Bill 67 makes technical fixes to Chapter 696, including updates to language and references and reorganization of some material for readability. This measure also removes the requirement that a principal real estate broker or real estate broker create a client trust account when they act as a courier by taking a check made out to the seller or lessor from a purchaser or lessee for the purpose of conveying same to the seller or lessor.

This measure also provides that a licensed real estate property manager may not solicit a potential tenant unless they have a written property management agreement with the lessor.

Senate Bill 68 updates fees paid to the Agency for professional licenses and other associated fees. It is linked to Policy Option Package 101 in the Agency's 2017-19 Legislatively Adopted Budget. The updated fees will provide sufficiency for the Oregon Real Estate Agency to achieve its mission.

## **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.

### **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, reactivation and information updates. In the initial two years following the launch, a marked workload reduction in back office transactions was 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

## BUDGET NARRATIVE

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manual input of licensee information by staff thus improving accuracy. 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 as well as improving administrative task automation and paperless processes internally.

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
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. Certified License History

Online processing of all applications is required. The Agency accepts credit card, debit card and electronic check payment online via a third-party vendor (US Bank E-Payment Services). The Agency does not collect or store account information. The Commissioner stringently enforces the Agency's policy of requiring the use of its eLicense system.

# BUDGET NARRATIVE

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In July 2015, the eLicense system was upgraded to version 7.2. The enhancement offers a new interface for public applicants and licensees with a modernized look and feel and more intuitive task oriented navigation, improved functionality through greater Agency access to business logic. The improved validation based system logic has provided a more seamless experience for licensees to allow previously complicated online processes to be completed in a single application with far greater ease.

In August 2015, the Agency implemented the Online Anytime Continuing Education module into the eLicense system. Where previously licensees were required to enter their 30 or more hours of continuing education courses at renewal, they may now enter the courses anytime as they take them through the renewal cycle. The system maintains the continuing education records and populates the information within the licensee's renewal.

## **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 performance measures. The Agency will continue to work closely with the Office of the CFO and LFO to monitor and seek opportunities to implement new measures where appropriate.

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 2017-19 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 and Statutes resulting in clear and concise language for implementation of standards and regulation, as well as, developing Legislative Concepts.

## **Criteria for 2019-21 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:

- Increase licensing related fees to continue the current service level of the Agency.

## BUDGET NARRATIVE

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- Continue to keep the Board and industry actively involved with the Agency and the Commissioner through outreach to all corners of the state in urban and rural communities.
- Provide adequate services and supplies limitation to maintain the current program level.
- Build a responsible cash reserve for the next economic downturn.

### **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 2019-21 Budget 919 Real Estate Agency

|   | TOTALS |       |                | FUND TYPE    |               |                |               |                  |         |
|---|--------|-------|----------------|--------------|---------------|----------------|---------------|------------------|---------|
|   | POS    | FTE   | ALL FUNDS      | General Fund | Lottery Funds | Other Funds    | Federal Funds | Nonlimited Other | Federal |
|   |        |       |                |              |               |                |               |                  |         |
| <b>2017-19 LEGISLATIVELY ADOPTED BUDGET</b>     | 29     | 29.00 | 7,621,789      |              |               | 6,897,314      |               |                  |         |
| <b>2017-19 Emergency Board Actions</b>          |        |       | 160,129        |              |               | 261,787        |               |                  |         |
| <b>2017-19 Legislatively Approved Budget</b>    | 29     | 29.00 | 7,781,918      |              |               | 7,159,101      |               |                  |         |
| <b>Base Budget Adjustments:</b>                 |        |       |                |              |               |                |               |                  |         |
| Net Cost of Position Actions:                   |        |       |                |              |               |                |               |                  |         |
| Administrative, Biennialized E-Board, Phase-Out |        |       | 455,258        |              |               | 393,367        |               |                  |         |
| Estimated Cost of Merit Increase                |        |       |                |              |               |                |               |                  |         |
| Base Debt Service Adjustment                    |        |       |                |              |               |                |               |                  |         |
| Base Nonlimited Adjustment                      |        |       |                |              |               |                |               |                  |         |
| Capital Construction Adjustment                 |        |       |                |              |               |                |               |                  |         |
| <b>Subtotal: 2017-19 Base Budget</b>            | 29     | 29.00 | 8,237,176      |              |               | 7,552,468      |               |                  |         |
| <b>Essential Packages:</b>                      |        |       |                |              |               |                |               |                  |         |
| <b>Package No. 010</b>                          |        |       |                |              |               |                |               |                  |         |
| Temporary Appts., Overtime, Differential        |        |       | 731            |              |               | 731            |               |                  |         |
| Vacancy Factor Increase/(Decrease)              |        |       | 174,789        |              |               | 174,789        |               |                  |         |
| Non-PICS Personal Service Increase/(Decrease)   |        |       | <u>31,241</u>  |              |               | <u>31,241</u>  |               |                  |         |
| <b>Subtotal</b>                                 |        |       | <b>206,761</b> |              |               | <b>206,761</b> |               |                  |         |
| <b>Package No. 021/022</b>                      |        |       |                |              |               |                |               |                  |         |

# BUDGET NARRATIVE

|  |           |              |                  |  |  |  |                  |  |  |
|--|-----------|--------------|------------------|--|--|--|------------------|--|--|
| 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/Decrease               |           |              | 97,598           |  |  |  | 97,598           |  |  |
| State Gov. Service Charges Increase/Decrease             |           |              | 45,238           |  |  |  | 45,238           |  |  |
| Subtotal   |           |              | <b>142,836</b>   |  |  |  | <b>142,836</b>   |  |  |
| <b>Package No. 91</b>                                    |           |              |                  |  |  |  |                  |  |  |
| Statewide Adjustment DAS Chgs                            |           |              | <b>(31,815)</b>  |  |  |  |                  |  |  |
| <b>Package No. 92</b>                                    |           |              |                  |  |  |  |                  |  |  |
| Statewide AG Adjustment                                  |           |              | <b>(18,196)</b>  |  |  |  |                  |  |  |
| <b>Package No. 101</b>                                   |           |              |                  |  |  |  |                  |  |  |
| Compliance Specialist Reclassification                   |           |              | <b>0</b>         |  |  |  | <b>0</b>         |  |  |
| <b>Subtotal: 2019-21 Current Service Level</b>           | 29        | 29.00        | 8,586,773        |  |  |  | 8,586,773        |  |  |
| <b>Subtotal: 2019-21 Modified Essential Budget Level</b> | 29        | 29.00        | 8,586,773        |  |  |  | 8,586,773        |  |  |
| <b>Subtotal Emergency Board Packages</b>                 |           |              |                  |  |  |  |                  |  |  |
| <b>Subtotal Policy Packages</b>                          |           |              |                  |  |  |  | 349,597          |  |  |
| <b>Total: 2019-21 Budget</b>                             | <b>29</b> | <b>29.00</b> | <b>8,586,773</b> |  |  |  | <b>8,586,773</b> |  |  |

|  |     |     |        |     |     |        |     |     |     |
|--|-----|-----|--------|-----|-----|--------|-----|-----|-----|
| Percent Change From 2017-19 Leg. Approved  | --% | --% | 9.70 % | --% | --% | 9.58%  | --% | --% | --% |
| Percent Change From Essential Budget Level | --% | --% | -0.58% | --% | --% | -0.68% | --% | --% | --% |

# BUDGET NARRATIVE

## Summary of 2019-21 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2019-21 Biennium

Agency GB Working  
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 |
|--|-----------|----------------------------|------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|
| 2017-19 Leg Adopted Budget                         | 29        | 29.00                      | 7,621,789        | -            | -             | 7,621,789        | -             | -                      | -                        |
| 2017-19 Emergency Boards                           | -         | -                          | 160,129          | -            | -             | 160,129          | -             | -                      | -                        |
| <b>2017-19 Leg Approved Budget</b>                 | <b>29</b> | <b>29.00</b>               | <b>7,781,918</b> | <b>-</b>     | <b>-</b>      | <b>7,781,918</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>2019-21 Base Budget Adjustments</b>             |           |                            |                  |              |               |                  |               |                        |                          |
| Net Cost of Position Actions                       |           |                            |                  |              |               |                  |               |                        |                          |
| Administrative Biennialized E-Board, Phase-Out     | -         | -                          | 455,258          | -            | -             | 455,258          | -             | -                      | -                        |
| Estimated Cost of Merit Increase                   | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Debt Service Adjustment                       | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Nonlimited Adjustment                         | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Capital Construction                               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal 2019-21 Base Budget</b>                | <b>29</b> | <b>29.00</b>               | <b>8,237,176</b> | <b>-</b>     | <b>-</b>      | <b>8,237,176</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>Essential Packages</b>                          |           |                            |                  |              |               |                  |               |                        |                          |
| 010 - Non-PICS Pers Svc/Vacancy Factor             |           |                            |                  |              |               |                  |               |                        |                          |
| Vacancy Factor (Increase)/Decrease                 | -         | -                          | 174,789          | -            | -             | 174,789          | -             | -                      | -                        |
| Non-PICS Personal Service Increase/(Decrease)      | -         | -                          | 31,972           | -            | -             | 31,972           | -             | -                      | -                        |
| <b>Subtotal</b>                                    | <b>-</b>  | <b>-</b>                   | <b>206,761</b>   | <b>-</b>     | <b>-</b>      | <b>206,761</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)       | -         | -                          | 97,598           | -            | -             | 97,598           | -             | -                      | -                        |
| State Gov't & Services Charges Increase/(Decrease) | -         | -                          | 45,238           | -            | -             | 45,238           | -             | -                      | -                        |

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# BUDGET NARRATIVE

## Summary of 2019-21 Biennium Budget

Real Estate Agency  
 Real Estate Agency  
 2019-21 Biennium

Agency GB Working  
 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</b>                                | -         | -                          | 142,836          | -            | -             | 142,836          | -             | -                      | -                        |
| 040 - Mandated Caseload                        |           |                            |                  |              |               |                  |               |                        |                          |
| 040 - Mandated Caseload                        | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| 050 - Fundshifts and Revenue Reductions        |           |                            |                  |              |               |                  |               |                        |                          |
| 050 - Fundshifts                               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| 060 - Technical Adjustments                    |           |                            |                  |              |               |                  |               |                        |                          |
| 060 - Technical Adjustments                    | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal: 2019-21 Current Service Level</b> | <b>29</b> | <b>29.00</b>               | <b>8,586,773</b> | <b>-</b>     | <b>-</b>      | <b>8,586,773</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |

# BUDGET NARRATIVE

## Summary of 2019-21 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2019-21 Biennium

Agency GB Working  
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: 2019-21 Current Service Level</b>       | 29        | 29.00                      | 8,586,773 | -            | -             | 8,586,773   | -             | -                      | -                        |
| <b>070 - Revenue Reductions/Shortfall</b>            |           |                            |           |              |               |             |               |                        |                          |
| 070 - Revenue Shortfalls                             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Modified 2019-21 Current Service Level</b>        | 29        | 29.00                      | 8,586,773 | -            | -             | 8,586,773   | -             | -                      | -                        |
| <b>080 - E-Boards</b>                                |           |                            |           |              |               |             |               |                        |                          |
| 080 - May 2018 E-Board                               | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Subtotal Emergency Board Packages</b>             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Policy Packages</b>                               |           |                            |           |              |               |             |               |                        |                          |
| 081 - September 2018 Emergency Board                 | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| 090 - Analyst Adjustments                            | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| 091 - Statewide Adjustment DAS Chgs                  | -         | -                          | (31,815)  | -            | -             | (31,815)    | -             | -                      | -                        |
| 092 - Statewide AG Adjustment                        | -         | -                          | (18,196)  | -            | -             | (18,196)    | -             | -                      | -                        |
| 101 - Compliance Specialist Reclassification         | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Subtotal Policy Packages</b>                      | -         | -                          | (50,011)  | -            | -             | (50,011)    | -             | -                      | -                        |
| <b>Total 2019-21 Agency GB Working</b>               | 29        | 29.00                      | 8,536,762 | -            | -             | 8,536,762   | -             | -                      | -                        |
| Percentage Change From 2017-19 Leg Approved Budget   | -         | -                          | 9.70%     | -            | -             | 9.70%       | -             | -                      | -                        |
| Percentage Change From 2019-21 Current Service Level | -         | -                          | -0.58%    | -            | -             | -0.58%      | -             | -                      | -                        |

# BUDGET NARRATIVE

## Summary of 2019-21 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2019-21 Biennium

Agency GB Working  
Cross Reference Number: 91900-050-01-00-00000

| Description  | Positions | Full-Time Equivalent (FTE) | ALL FUNDS        | General Fund | Lottery Funds | Other Funds      | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|
| 2017-19 Leg Adopted Budget                         | 29        | 29.00                      | 7,621,789        | -            | -             | 7,621,789        | -             | -                      | -                        |
| 2017-19 Emergency Boards                           | -         | -                          | 160,129          | -            | -             | 160,129          | -             | -                      | -                        |
| <b>2017-19 Leg Approved Budget</b>                 | <b>29</b> | <b>29.00</b>               | <b>7,781,918</b> | <b>-</b>     | <b>-</b>      | <b>7,781,918</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>2019-21 Base Budget Adjustments</b>             |           |                            |                  |              |               |                  |               |                        |                          |
| Net Cost of Position Actions                       |           |                            |                  |              |               |                  |               |                        |                          |
| Administrative Biennialized E-Board, Phase-Out     | -         | -                          | 455,258          | -            | -             | 455,258          | -             | -                      | -                        |
| Estimated Cost of Merit Increase                   | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Debt Service Adjustment                       | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Base Nonlimited Adjustment                         | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| Capital Construction                               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal 2019-21 Base Budget</b>                | <b>29</b> | <b>29.00</b>               | <b>8,237,176</b> | <b>-</b>     | <b>-</b>      | <b>8,237,176</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |
| <b>Essential Packages</b>                          |           |                            |                  |              |               |                  |               |                        |                          |
| 010 - Non-PICS Pers Svc/Vacancy Factor             |           |                            |                  |              |               |                  |               |                        |                          |
| Vacancy Factor (Increase)/Decrease                 | -         | -                          | 174,789          | -            | -             | 174,789          | -             | -                      | -                        |
| Non-PICS Personal Service Increase/(Decrease)      | -         | -                          | 31,972           | -            | -             | 31,972           | -             | -                      | -                        |
| <b>Subtotal</b>                                    | <b>-</b>  | <b>-</b>                   | <b>206,761</b>   | <b>-</b>     | <b>-</b>      | <b>206,761</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)       | -         | -                          | 97,598           | -            | -             | 97,598           | -             | -                      | -                        |
| State Gov't & Services Charges Increase/(Decrease) | -         | -                          | 45,238           | -            | -             | 45,238           | -             | -                      | -                        |

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BDV104 - Biennial Budget Summary  
BDV104

# BUDGET NARRATIVE

## Summary of 2019-21 Biennium Budget

Real Estate Agency  
 Real Estate Agency  
 2019-21 Biennium

Agency GB Working  
 Cross Reference Number: 91900-050-01-00-00000

| Description                                    | Positions | Full-Time Equivalent (FTE) | ALL FUNDS        | General Fund | Lottery Funds | Other Funds      | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|
| Subtotal                                       | -         | -                          | 142,836          | -            | -             | 142,836          | -             | -                      | -                        |
| 040 - Mandated Caseload                        |           |                            |                  |              |               |                  |               |                        |                          |
| 040 - Mandated Caseload                        | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| 050 - Fundshifts and Revenue Reductions        |           |                            |                  |              |               |                  |               |                        |                          |
| 050 - Fundshifts                               | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| 060 - Technical Adjustments                    |           |                            |                  |              |               |                  |               |                        |                          |
| 060 - Technical Adjustments                    | -         | -                          | -                | -            | -             | -                | -             | -                      | -                        |
| <b>Subtotal: 2019-21 Current Service Level</b> | <b>29</b> | <b>29.00</b>               | <b>8,586,773</b> | <b>-</b>     | <b>-</b>      | <b>8,586,773</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 |

# BUDGET NARRATIVE

## Summary of 2019-21 Biennium Budget

Real Estate Agency  
Real Estate Agency  
2019-21 Biennium

Agency GB Working  
Cross Reference Number: 91900-050-01-00-00000

| Description  | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-----------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| <b>Subtotal: 2019-21 Current Service Level</b>       | 29        | 29.00                      | 8,586,773 | -            | -             | 8,586,773   | -             | -                      | -                        |
| 070 - Revenue Reductions/Shortfall                   |           |                            |           |              |               |             |               |                        |                          |
| 070 - Revenue Shortfalls                             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Modified 2019-21 Current Service Level</b>        | 29        | 29.00                      | 8,586,773 | -            | -             | 8,586,773   | -             | -                      | -                        |
| 080 - E-Boards                                       |           |                            |           |              |               |             |               |                        |                          |
| 080 - May 2018 E-Board                               | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Subtotal Emergency Board Packages</b>             | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| Policy Packages                                      |           |                            |           |              |               |             |               |                        |                          |
| 081 - September 2018 Emergency Board                 | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| 090 - Analyst Adjustments                            | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| 091 - Statewide Adjustment DAS Chgs                  | -         | -                          | (31,815)  | -            | -             | (31,815)    | -             | -                      | -                        |
| 092 - Statewide AG Adjustment                        | -         | -                          | (18,196)  | -            | -             | (18,196)    | -             | -                      | -                        |
| 101 - Compliance Specialist Reclassification         | -         | -                          | -         | -            | -             | -           | -             | -                      | -                        |
| <b>Subtotal Policy Packages</b>                      | -         | -                          | (50,011)  | -            | -             | (50,011)    | -             | -                      | -                        |
| <b>Total 2019-21 Agency GB Working</b>               | 29        | 29.00                      | 8,536,762 | -            | -             | 8,536,762   | -             | -                      | -                        |
| Percentage Change From 2017-19 Leg Approved Budget   | -         | -                          | 9.70%     | -            | -             | 9.70%       | -             | -                      | -                        |
| Percentage Change From 2019-21 Current Service Level | -         | -                          | -0.58%    | -            | -             | -0.58%      | -             | -                      | -                        |



# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Agencywide Program Unit Summary  
2019-21 Biennium

Version: Y - 01 - Governor's Budget

| Summary<br>Cross Reference<br>Number | Cross Reference Description | 2015-17<br>Actuals | 2017-19 Leg<br>Adopted<br>Budget | 2017-19 Leg<br>Approved<br>Budget | 2019-21<br>Agency<br>Request<br>Budget | 2019-21<br>Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|--------------------------------------|-----------------------------|--------------------|----------------------------------|-----------------------------------|--|---------------------------------|-------------------------------|
| 050-00-00-00000                      | Real Estate Agency          |                    |                                  |                                   |  |                                 |                               |
|                                      | Other Funds                 | 6,735,567          | 7,621,789                        | 7,781,918                         | 8,586,773                              | 8,536,762                       | -                             |
| <b>TOTAL AGENCY</b>                  |                             |                    |                                  |                                   |  |                                 |                               |
|                                      | Other Funds                 | 6,735,567          | 7,621,789                        | 7,781,918                         | 8,586,773                              | 8,536,762                       | -                             |

\_\_\_\_ Agency Request  
2019-21 Biennium

\_\_\_\_ Governor's Budget  
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\_\_\_\_ Legislatively Adopted  
Agencywide Program Unit Summary - BPR010

# BUDGET NARRATIVE

| Real Estate Agency  |   |   |  |           |                |      |       |  |  |       |
|---|---|---|--|-----------|----------------|------|-------|--|--|-------|
| 2019-21 Biennium  |   |   |  |           |                |      |       |  |  |       |
|   |   |   |  |           |                |      |       | Agency Number:                         |  | 91900 |
| Department-Wide Priorities for 2019-21 Biennium   |   |   |  |           |                |      |       |  |  |       |
| 2   | 5   | 6   | 7  | 10        | 14             | 15   | 16    | 17                                     | 18   |       |
| Priority<br>(ranked<br>with<br>highest<br>priority<br>first)  | Program Unit/Activity Description   | Identify Key Performance<br>Measure(s)  | Primary<br>Purpose<br>Program-<br>Activity<br>Code | OF        | TOTAL<br>FUNDS | Pos. | FTE   | New or<br>Enhanced<br>Program<br>(Y/N) | Included as Reduction Option<br>(Y/N)  |       |
| Prgm/ Div   |   |   |  |           |                |      |       |  |  |       |
| 1   | <b>Administrative Services: Customer Service</b> Licensing: Applications, Renewals, Business and Branch Office Registrations. Education: Licensee Outreach: Pre/Post License Education and Exam Development). <b>Business &amp; Technology</b> (Budget, Accounting, Information Technology, Personnel & Payroll, Contracts & Procurement) | <b>KPM 1</b> - % of property managers/principal brokers reviewed who meet compliance<br><b>KPM 4</b> % of property managers/principal brokers who rate the exam as effective<br><b>KPM 6</b> - customer service standards | 3  | 2,943,711 | \$ 2,943,711   | 9    | 10.00 | N                                      | Two Administrative Specialist positions is included.                                 |       |
| 2   | <b>Regulation and Enforcement</b> (Compliants, Investigations, Adminstrative Actions, Civil Penalty enforcement)  | <b>KPM 2</b> - Days to complete investigation<br><b>KPM 3</b> - Contest Case Actions resolved through resolution  | 3  | 4,121,195 | \$ 4,121,195   | 15   | 14.00 | N                                      | One Administrative Specialist and Two Financial Investigator positions are included. |       |
| 3   | <b>Land Development</b> (Condo, timeshare, membership campgrounds registrations, Real Estate Marketing Organization licensing & regulation)   | <b>KPM 6</b> - Customer Service Standards   | 3  | 588,742   | \$ 588,742     | 2    | 2.00  | N                                      | N  |       |
| 4   | <b>Board Support, Commissioner's Office</b> (Commissioner and Deputy Commissioner's office, Real Estate Board and Advisory Group Support, Administrative Rule Reviews and Legislative Concept Development)  | <b>KPM 6</b> - Customer Service Standards   | 4  | 883,114   | \$ 883,114     | 3    | 3.00  | N                                      | N  |       |
|   |   |   |  | 8,536,762 | \$ 8,536,762   | 29   | 29.00 |  |  |       |
| <p>The Real Estate Agency is based on the statutory mandate to operate a licensing and regulatory agency. The statute finds that the activity of persons seeking to assist others, for compensation, to deal in real estate in the State of Oregon is a matter of public concern. The statutes assist in creating for the public a healthy real estate market and assure that professional real estate activity is conducted with high fiduciary standards. All of the Agency's activities promote this statutory mandate and are interrelated. The Agency has one detail cross reference level, which includes the costs for the Licensing, Regulation, Education and Land Development program, along with Administrative costs.</p> |   |   |  |           |                |      |       |  |  |       |

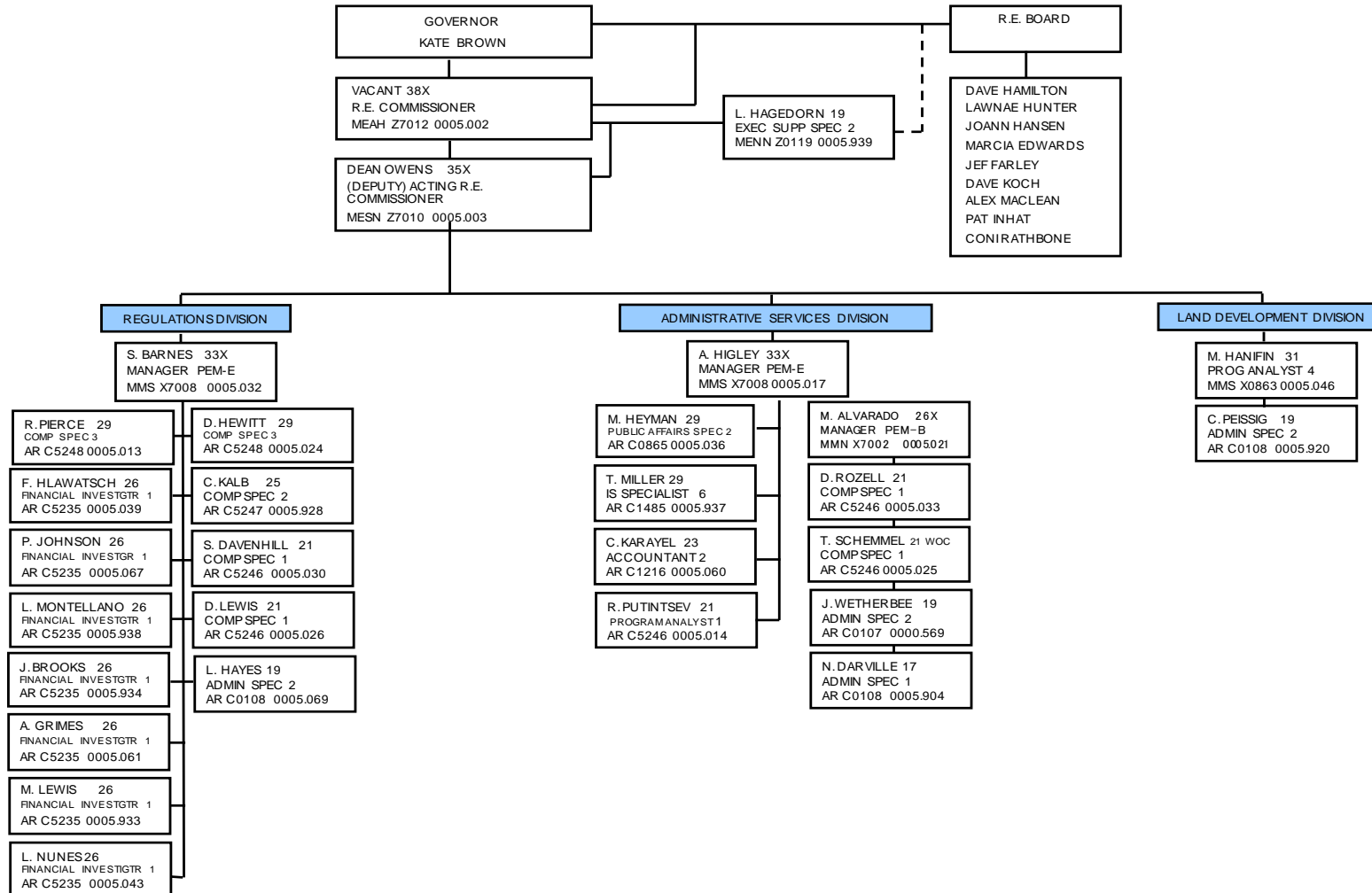
# BUDGET NARRATIVE

## 10% Reduction Options (ORS 291.216)

| ACTIVITY OR PROGRAM<br>(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)                      | DESCRIBE REDUCTION<br>(DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2019-21 AND 2021-23)              | AMOUNT AND FUND TYPE<br>(GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF) | RANK AND JUSTIFICATION<br>(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED) |
|--|---|--|---|
| 1. Eliminate two Administrative Services Professional positions: Customer Services.            | MANAGEMENT AND REMAINING STAFF WOULD ABSORB DUTIES. WORK PRODUCT, CUSTOMER SERVICE RATINGS AND DELIVERY TIME AT RISK.         | \$293,805<br>OTHER FUNDS   | (1)   |
| 2. Eliminate one Regulatory Administrative Specialist and one Compliance Specialist positions. | EFFECTS LISTED ABOVE WOULD APPLY.   | \$338,726<br>OTHER FUNDS   | (2)   |
| 3. Eliminate one Financial Investigator 1 positions.   | EFFECTS LISTED ABOVE WOULD APPLY.   | \$215,221<br>OTHER FUNDS   | (3)   |
| 4. Eliminate use of instate and out-of-state travel.   | AGENCY WOULD DECREASE OUT-OF-AREA BOARD MEETINGS AND EMPLOYEES WOULD NOT BENEFIT FROM TRAINING OFFERED OUTSIDE OF SALEM AREA. | \$5,924<br>OTHER FUNDS   | (4)   |
|  | TOTAL REDUCTIONS  | \$853,676<br>OTHER FUNDS   |   |

# BUDGET NARRATIVE

## 2019-21 REAL ESTATE AGENCY ORGANIZATION CHART



# BUDGET NARRATIVE

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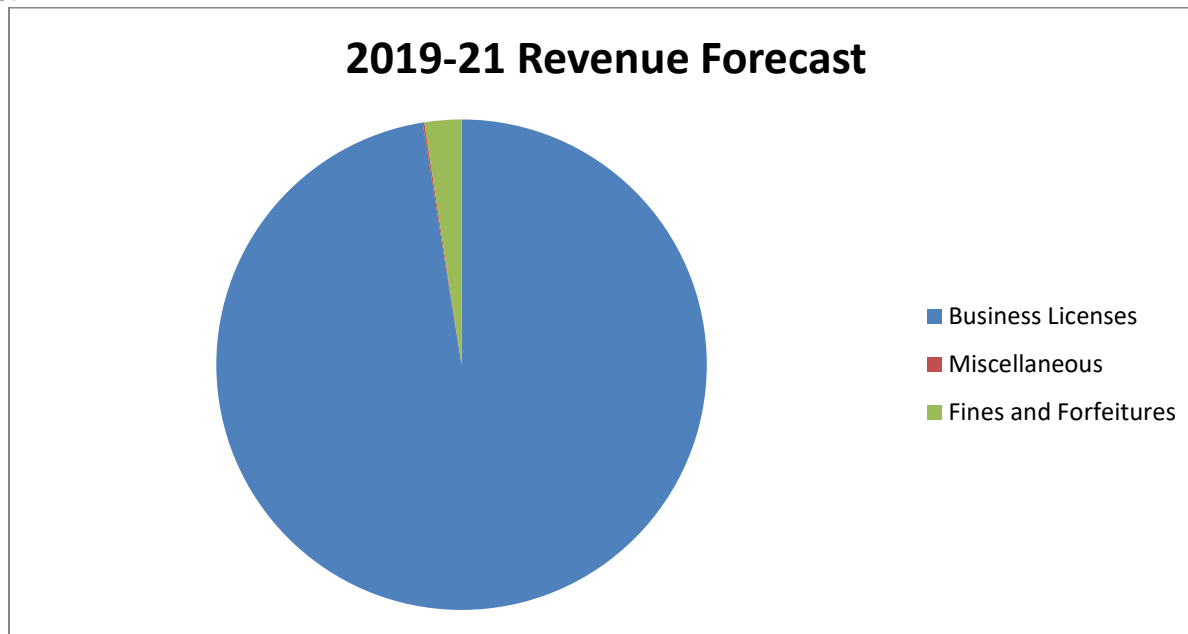
# BUDGET NARRATIVE

## 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; the legislature approved the Agency’s policy option package in the last session and fees were raised for the first time in 20 years (1997 legislative session) on January 1<sup>st</sup>, 2018. The Agency anticipates 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.
- Principal Broker, Broker or Property Manager license - \$300,
- Renewal for Active Principal Broker, Broker or Property Manager license - \$300,
- Renewal for Inactive Principal Broker, Broker or Property Manager license - \$150,
- Notification of opening or closing of a branch or transfer - \$10,
- Reactivation of inactive license for Broker or Property Manager - \$150, and
- Late Renewal - \$150.



## BUDGET NARRATIVE

| Source                | Fund  | ORBITS<br>Revenue<br>Acct | 2015-2017<br>Actual | 2017-19<br>Legislatively<br>Adopted | 2017-19<br>Estimated | 2019-21            |                           |                              |
|-----------------------|-------|---------------------------|---------------------|-------------------------------------|----------------------|--------------------|---------------------------|------------------------------|
|                       |       |                           |                     |                                     |                      | Agency<br>Request  | Governor's<br>Recommended | Legislativel<br>y<br>Adopted |
| Business Licenses     | Other | 205                       | \$6,455,811         | \$8,150,232                         | \$8,435,535          | \$8,435,535        | \$8,435,535               |                              |
| Miscellaneous*        | Other | 410                       | \$3,914             | \$43,333                            | \$7,794              | \$7,794            | \$7,794                   |                              |
| Fines and Forfeitures | Other | 505                       | \$101,775           | \$344,850                           | \$209,760            | \$209,760          | \$209,760                 |                              |
| Other Revenues        | Other | 0975                      | \$1,655             |                                     | \$1,656              | \$1,656            | \$1,656                   |                              |
| Transfer to Gen. Fund | Other |                           | (\$59,865)          | (\$90,000)                          | (\$90,000)           | (\$90,000)         | (\$90,000)                |                              |
| <b>Total</b>          |       |                           | <b>\$6,503,290</b>  | <b>\$8,448,415</b>                  | <b>\$8,564,745</b>   | <b>\$8,564,745</b> | <b>\$8,564,745</b>        |                              |

# BUDGET NARRATIVE

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# BUDGET NARRATIVE

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

Real Estate Agency NOT AUDITED Agency Number: 91900  
 2019-21 Biennium Cross Reference Number: 91900-000-00-00-00000

| Source                   | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved Budget | 2019-21 Agency<br>Request Budget | 2019-21 Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|--------------------------|--------------------|-------------------------------|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| <b>Other Funds</b>       |                    |                               |                                |                                  |                              |                               |
| Business Lic and Fees    | 6,455,811          | 8,150,232                     | 8,150,232                      | 8,435,535                        | 8,435,535                    | -                             |
| Charges for Services     | 3,914              | 43,333                        | 43,333                         | 7,794                            | 7,794                        | -                             |
| Fines and Forfeitures    | 101,775            | 344,850                       | 344,850                        | 209,760                          | 209,760                      | -                             |
| Other Revenues           | 1,655              | -                             | -                              | 1,656                            | 1,656                        | -                             |
| Transfer to General Fund | (59,865)           | (90,000)                      | (90,000)                       | (90,000)                         | (90,000)                     | -                             |
| <b>Total Other Funds</b> | <b>\$6,503,290</b> | <b>\$8,448,415</b>            | <b>\$8,448,415</b>             | <b>\$8,564,745</b>               | <b>\$8,564,745</b>           | -                             |

# BUDGET NARRATIVE

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

Real Estate Agency Agency Number: 91900  
 2019-21 Biennium Cross Reference Number: 91900-050-00-00-00000

| Source                   | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved Budget | 2019-21 Agency<br>Request Budget | 2019-21 Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|--------------------------|--------------------|-------------------------------|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| <b>Other Funds</b>       |                    |                               |                                |                                  |                              |                               |
| Business Lic and Fees    | 6,455,811          | 8,150,232                     | 8,150,232                      | 8,435,535                        | 8,435,535                    | -                             |
| Charges for Services     | 3,914              | 43,333                        | 43,333                         | 7,794                            | 7,794                        | -                             |
| Fines and Forfeitures    | 101,775            | 344,850                       | 344,850                        | 209,780                          | 209,780                      | -                             |
| Other Revenues           | 1,855              | -                             | -                              | 1,856                            | 1,856                        | -                             |
| Transfer to General Fund | (59,865)           | (90,000)                      | (90,000)                       | (90,000)                         | (90,000)                     | -                             |
| <b>Total Other Funds</b> | <b>\$6,503,290</b> | <b>\$8,448,415</b>            | <b>\$8,448,415</b>             | <b>\$8,564,745</b>               | <b>\$8,564,745</b>           | -                             |

# BUDGET NARRATIVE

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## Real Estate Agency

### 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 3.8% on non-PICS items of temporaries, overtime, shift differentials, and unemployment compensation. Mass transit taxes are \$3,542. This package increases Personal Services by \$206,761, which is all Other Funds.

##### 2019-21 Fiscal Impact

As part of the end of session adjustment to 2017-19 LAB, a vacancy factor of \$194,991 was applied to the Agency budget. This is equivalent to one to two FTE, of 29, for the entirety of the biennium. The Agency has not experienced vacancies to allow for this savings. Further, losing up to two employees for a two year period would threaten the Agency's ability to meet performance goals and KPM benchmarks for customer service and case processing rates. In this essential package the Agency seeks to restore this outsized vacancy factor by increasing this account by \$174,789, applying a more pragmatic target of \$(20,202) vacancy savings in CSL.

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency

Cross Reference Name: Real Estate Agency

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

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>       |              |               |                    |               |                        |                          |                    |
| Temporary Appointments         | -            | -             | 568                | -             | -                      | -                        | 568                |
| Overtime Payments              | -            | -             | 105                | -             | -                      | -                        | 105                |
| All Other Differential         | -            | -             | 58                 | -             | -                      | -                        | 58                 |
| Public Employees' Retire Cont  | -            | -             | 28                 | -             | -                      | -                        | 28                 |
| Pension Obligation Bond        | -            | -             | 27,601             | -             | -                      | -                        | 27,601             |
| Social Security Taxes          | -            | -             | 55                 | -             | -                      | -                        | 55                 |
| Unemployment Assessments       | -            | -             | 15                 | -             | -                      | -                        | 15                 |
| Mass Transit Tax               | -            | -             | 3,542              | -             | -                      | -                        | 3,542              |
| Vacancy Savings                | -            | -             | 174,789            | -             | -                      | -                        | 174,789            |
| <b>Total Personal Services</b> | -            | -             | <b>\$206,761</b>   | -             | -                      | -                        | <b>\$206,761</b>   |
| <b>Total Expenditures</b>      |              |               |                    |               |                        |                          |                    |
| Total Expenditures             | -            | -             | 206,761            | -             | -                      | -                        | 206,761            |
| <b>Total Expenditures</b>      | -            | -             | <b>\$206,761</b>   | -             | -                      | -                        | <b>\$206,761</b>   |
| <b>Ending Balance</b>          |              |               |                    |               |                        |                          |                    |
| Ending Balance                 | -            | -             | (206,761)          | -             | -                      | -                        | (206,761)          |
| <b>Total Ending Balance</b>    | -            | -             | <b>(\$206,761)</b> | -             | -                      | -                        | <b>(\$206,761)</b> |

\_\_\_\_ Agency Request  
2019-21 Biennium

\_\_\_\_ Governor's Budget  
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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 \$142,836. This is based on the biennial general inflation factor which is applied to most Services and Supplies and non-PICS Personal Services costs for 2019-21 of 3.8%. The inflation factor for Professional Services accounts was 4.2%, Attorney General was 20.14%, and State Government Service Charges was 22.01%.

### **2019-21 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>Personal Services</b>         |              |               |             |               |                        |                          |           |
| Temporary Appointments           | -            | -             | -           | -             | -                      | -                        | -         |
| Overtime Payments                | -            | -             | -           | -             | -                      | -                        | -         |
| Public Employees' Retire Cont    | -            | -             | -           | -             | -                      | -                        | -         |
| Social Security Taxes            | -            | -             | -           | -             | -                      | -                        | -         |
| <b>Total Personal Services</b>   | <b>-</b>     | <b>-</b>      | <b>-</b>    | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>-</b>  |
| <b>Services &amp; Supplies</b>   |              |               |             |               |                        |                          |           |
| Instate Travel                   | -            | -             | 3,247       | -             | -                      | -                        | 3,247     |
| Out of State Travel              | -            | -             | 369         | -             | -                      | -                        | 369       |
| Employee Training                | -            | -             | 1,354       | -             | -                      | -                        | 1,354     |
| Office Expenses                  | -            | -             | 3,040       | -             | -                      | -                        | 3,040     |
| Telecommunications               | -            | -             | 2,366       | -             | -                      | -                        | 2,366     |
| State Gov. Service Charges       | -            | -             | 45,238      | -             | -                      | -                        | 45,238    |
| Data Processing                  | -            | -             | 4,001       | -             | -                      | -                        | 4,001     |
| Publicity and Publications       | -            | -             | 1,344       | -             | -                      | -                        | 1,344     |
| Professional Services            | -            | -             | 4,245       | -             | -                      | -                        | 4,245     |
| IT Professional Services         | -            | -             | 3,266       | -             | -                      | -                        | 3,266     |
| Attorney General                 | -            | -             | 51,267      | -             | -                      | -                        | 51,267    |
| Employee Recruitment and Develop | -            | -             | 284         | -             | -                      | -                        | 284       |
| Dues and Subscriptions           | -            | -             | 351         | -             | -                      | -                        | 351       |
| Facilities Rental and Taxes      | -            | -             | 9,321       | -             | -                      | -                        | 9,321     |
| Facilities Maintenance           | -            | -             | 165         | -             | -                      | -                        | 165       |
| Agency Program Related S and S   | -            | -             | 1,512       | -             | -                      | -                        | 1,512     |
| Other Services and Supplies      | -            | -             | 4,433       | -             | -                      | -                        | 4,433     |
| Expendable Prop 250 - 5000       | -            | -             | 1,067       | -             | -                      | -                        | 1,067     |

Agency Request  
2019-21 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: 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>Services &amp; Supplies</b>       |              |               |                    |               |                        |                          |                    |
| IT Expendable Property               | -            | -             | 5,966              | -             | -                      | -                        | 5,966              |
| <b>Total Services &amp; Supplies</b> | -            | -             | <b>\$142,836</b>   | -             | -                      | -                        | <b>\$142,836</b>   |
| <b>Total Expenditures</b>            |              |               |                    |               |                        |                          |                    |
| Total Expenditures                   | -            | -             | 142,836            | -             | -                      | -                        | 142,836            |
| <b>Total Expenditures</b>            | -            | -             | <b>\$142,836</b>   | -             | -                      | -                        | <b>\$142,836</b>   |
| <b>Ending Balance</b>                |              |               |                    |               |                        |                          |                    |
| Ending Balance                       | -            | -             | (142,836)          | -             | -                      | -                        | (142,836)          |
| <b>Total Ending Balance</b>          | -            | -             | <b>(\$142,836)</b> | -             | -                      | -                        | <b>(\$142,836)</b> |

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# BUDGET NARRATIVE

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## **091 Statewide Adjustment DAS Chgs Package**

### **Description**

This package reflects a reduction in costs related to DAS administered State Government Service Changes, \$31,815.

### **2019-21 Fiscal Impact**

No impact.



# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
 Pkg: 091 - Statewide Adjustment DAS Chgs

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>Services &amp; Supplies</b>       |              |               |                   |               |                        |                          |                   |
| State Gov. Service Charges           | -            | -             | (16,872)          | -             | -                      | -                        | (16,872)          |
| Attorney General                     | -            | -             | -                 | -             | -                      | -                        | -                 |
| Other Services and Supplies          | -            | -             | (14,943)          | -             | -                      | -                        | (14,943)          |
| <b>Total Services &amp; Supplies</b> | <b>-</b>     | <b>-</b>      | <b>(\$31,815)</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>(\$31,815)</b> |
| <b>Total Expenditures</b>            |              |               |                   |               |                        |                          |                   |
| Total Expenditures                   | -            | -             | (31,815)          | -             | -                      | -                        | (31,815)          |
| <b>Total Expenditures</b>            | <b>-</b>     | <b>-</b>      | <b>(\$31,815)</b> | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>(\$31,815)</b> |
| <b>Ending Balance</b>                |              |               |                   |               |                        |                          |                   |
| Ending Balance                       | -            | -             | 31,815            | -             | -                      | -                        | 31,815            |
| <b>Total Ending Balance</b>          | <b>-</b>     | <b>-</b>      | <b>\$31,815</b>   | <b>-</b>      | <b>-</b>               | <b>-</b>                 | <b>\$31,815</b>   |

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# BUDGET NARRATIVE

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## **092 Statewide AG Adjustment**

### **Description**

This package reflects a reduction in costs related to Attorney General charges, \$18,196.

### **2019-21 Fiscal Impact**

No impact.

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency  
Pkg: 092 - Statewide AG Adjustment

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>Services &amp; Supplies</b>       |              |               |                   |               |                        |                          |                   |
| Attorney General                     | -            | -             | (18,196)          | -             | -                      | -                        | (18,196)          |
| <b>Total Services &amp; Supplies</b> | -            | -             | <b>(\$18,196)</b> | -             | -                      | -                        | <b>(\$18,196)</b> |
| <b>Total Expenditures</b>            |              |               |                   |               |                        |                          |                   |
| Total Expenditures                   | -            | -             | (18,196)          | -             | -                      | -                        | (18,196)          |
| <b>Total Expenditures</b>            | -            | -             | <b>(\$18,196)</b> | -             | -                      | -                        | <b>(\$18,196)</b> |
| <b>Ending Balance</b>                |              |               |                   |               |                        |                          |                   |
| Ending Balance                       | -            | -             | 18,196            | -             | -                      | -                        | 18,196            |
| <b>Total Ending Balance</b>          | -            | -             | <b>\$18,196</b>   | -             | -                      | -                        | <b>\$18,196</b>   |

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# BUDGET NARRATIVE

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## **101 Compliance Specialist Reclassification**

### **Package Description**

This policy option package seeks to reclassify one Agency position from an Administrative Specialist II (20) to a Compliance Specialist I (21)

In 2016 the Agency consolidated the Education division in to Administrative Services. This position has transitioned from processing license applications and responding to inquiries on the licensing process to compliance related duties in Education. This position underwent a classification analysis resulting in a Compliance Specialist I assessment and has been in a work out of class since December of 2016.

### **2019-21 Fiscal Impact**

No impact.

# BUDGET NARRATIVE

## ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency

Cross Reference Name: Real Estate Agency

Pkg: 101 - Compliance Specialist Reclassification

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>        |              |               |             |               |                        |                          |           |
| Class/Unclass Sal. and Per Diem | -            | -             | -           | -             | -                      | -                        | -         |
| <b>Total Personal Services</b>  | -            | -             | -           | -             | -                      | -                        | -         |
| <b>Total Expenditures</b>       |              |               |             |               |                        |                          |           |
| Total Expenditures              | -            | -             | -           | -             | -                      | -                        | -         |
| <b>Total Expenditures</b>       | -            | -             | -           | -             | -                      | -                        | -         |
| <b>Ending Balance</b>           |              |               |             |               |                        |                          |           |
| Ending Balance                  | -            | -             | -           | -             | -                      | -                        | -         |
| <b>Total Ending Balance</b>     | -            | -             | -           | -             | -                      | -                        | -         |

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

Real Estate Agency Agency Number: 91900  
 2019-21 Biennium Cross Reference Number: 91900-000-00-00-00000

| Source                   | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved Budget | 2019-21 Agency<br>Request Budget | 2019-21 Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|--------------------------|--------------------|-------------------------------|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| <b>Other Funds</b>       |                    |                               |                                |                                  |                              |                               |
| Business Lic and Fees    | 6,455,811          | 8,150,232                     | 8,150,232                      | 8,435,535                        | 8,435,535                    | -                             |
| Charges for Services     | 3,914              | 43,333                        | 43,333                         | 7,794                            | 7,794                        | -                             |
| Fines and Forfeitures    | 101,775            | 344,850                       | 344,850                        | 209,760                          | 209,760                      | -                             |
| Other Revenues           | 1,855              | -                             | -                              | 1,856                            | 1,856                        | -                             |
| Transfer to General Fund | (59,865)           | (90,000)                      | (90,000)                       | (90,000)                         | (90,000)                     | -                             |
| <b>Total Other Funds</b> | <b>\$6,503,290</b> | <b>\$8,448,415</b>            | <b>\$8,448,415</b>             | <b>\$8,564,745</b>               | <b>\$8,564,745</b>           | -                             |

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## *Real Estate Agency*

Policy Package List by Priority  
2019-21 Biennium

Agency Number: 91900

BAM Analyst: Morse-Miller, Haylee

Budget Coordinator: Higley, Anna - (503)378-4671

| <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 2018 Emergency Board         | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 091                      | Statewide Adjustment DAS Chgs          | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 092                      | Statewide AG Adjustment                | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 101                      | Compliance Specialist Reclassification | 050-00-00-00000                       | Real Estate Agency                 |

# BUDGET NARRATIVE

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# BUDGET NARRATIVE

## II. OREA Affirmative Action Plan

### A. Agency Affirmative Action Policy Statement/Diversity & Inclusion Statement



Oregon

Kate Brown, Governor

Real Estate Agency  
530 Center St. NE, Suite 100  
Salem, Oregon 97301-2505  
Phone: (503) 378-4170  
Regulations Fax: (503) 373-7153  
Admin. Fax: (503) 378-2491  
[www.oregon.gov/rea](http://www.oregon.gov/rea)

DATE: September 6, 2018  
TO: All Employees  
FROM: Dean Owens, Acting Real Estate Commissioner

The Oregon Real Estate Agency (OREA) is committed to diversity, equity and inclusion and strives to integrate diversity, equity and inclusion into all facets of our business and services to better serve the diverse citizens of Oregon.

The Agency maintains and embeds a diverse and inclusive environment and organizational culture. The Agency makes every effort to ensure that all employees and customers, regardless of sex, age, race, national origin, color, ethnicity, religion, sexual orientation, veterans, people with disabilities, or any other protected class prohibited by law or policy of the state or federal government, have a fair and equal chance for available employment opportunities with our Agency. OREA will continue its efforts to recruit applicants that are reflective of the diversity of Oregon.

Creating and maintaining a work environment that is positive, respectful, safe, and free from harassment and discrimination of any kind is expected by all employees of the Oregon Real Estate Agency. Management staff is responsible for ensuring that the work environment is harassment and discrimination free. No form of harassment or discrimination will be tolerated. The Agency understands that prevention is essential to impede harassment.

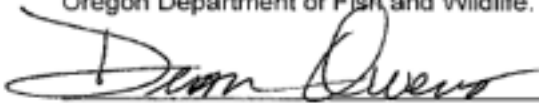
OREA will not discriminate, or tolerate discrimination, against any employee because they are a member of, apply to be a member of, perform, has performed, applied to perform or have an obligation to perform service in a uniformed service.

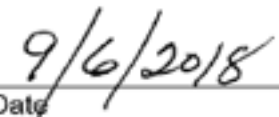
All applicants and employees are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

OREA will make every reasonable good faith effort to provide reasonable accommodation in employment and to our clients, applicants for services and members of the general public who have disabilities, as defined by statute.

OREA strives to make all employees feel welcome and is committed to its Affirmative Action Plan and goals of creating and maintaining a highly-qualified, diverse workforce.

We ask that you strive to create and maintain a positive work environment for yourself and your co-workers. If you have any questions about the information contained in this document, please discuss it with your manager or Alida McNew, OREA's HR Analyst at the Oregon Department of Fish and Wildlife.

  
Dean Owens, Acting Real Estate Commissioner

  
Date

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## B. Policy

### a. Agency AA Policy/DI Statement/State and Federal Employment Law Documents:

A copy of the Agency's Affirmative Action Plan is available on the OREA shared common G drive and is also available for managers and employees to review on request to the OREA Affirmative Action Representative. The Agency Affirmative Action Policy Statement/Diversity & Inclusion Statement is posted on the Internet below the Agency's mission statement under the "About Us" tab and will also be posted on a bulletin board in the agency breakroom/kitchen area. State and federal employment law documents are available on the Internet for easy access by employees, volunteers and/or contractors/vendors. For more information about the OREA Affirmative Action Plan or other related documents, please contact:

#### **OREA Affirmative Action Representative**

Leandra Hagedorn, Executive Assistant

503-378-6543

[leandra.hagedorn@oregon.gov](mailto:leandra.hagedorn@oregon.gov)

### b. Complaint Options:

It is imperative that the Agency is responsive to employee concerns of discrimination. Employees who feel they have been harassed or discriminated against are encouraged to bring their concerns to Agency management. A supervisor or manager receiving a complaint should promptly notify the Oregon Department of Fish and Wildlife Human Resources Office. Any individual who believes s/he has been discriminated against on the basis of a protected class may file a complaint as outlined in [Department of Administrative Services Policy, DAS 50-010-01, Discrimination and Harassment Free Workplace.](#)

Individuals also have the right to file grievances or complaints of discrimination instead, or concurrently, with the Governor's Office of Diversity, Equity & Inclusion, the Bureau of Labor and Industries, the Equal Employment Opportunity Commission or in accordance with the collective bargaining agreement.

#### ***Governor's Office of Diversity, Equity & Inclusion/Affirmative Action***

900 Court Street NE, Suite 254

Salem, Oregon 97301

Phone Number: 503-378-6833

#### ***Oregon Bureau of Labor and Industries - Civil Rights***

##### ***Division Portland***

State Office Building

800 NE Oregon Street, Suite 1070

Portland, OR 97232

Phone Number: English: 971-673-0764

Spanish: 971-673-2818

Fax: 971-673-0765

E-mail: [crdemail@boli.state.or.us](mailto:crdemail@boli.state.or.us)

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## *Eugene*

1400 Executive Parkway, Suite 200  
Eugene, OR 97401  
Phone Number: 541-686-7623

## *Salem*

3865 Wolverine Street NE, Bldg. E-1  
Salem, OR 97305-1268  
Phone Number: 503-378-3292

The Oregon Bureau of Labor and Industries – Civil Rights Division is the Oregon state equivalent of the federal EEOC. As a designated Fair Employment Practices Agency (FEPA), the Oregon Bureau of Labor and Industries – Civil Rights Division may coordinate operations with the EEOC under a work-share agreement. Furthermore, the Oregon Bureau of Labor and Industries – Civil Rights Division investigates state claims that are not covered by federal law or exceed the basic protections of federal law. Individuals filing a charge of discrimination with the EEOC should also file a copy of the charge with the Oregon Bureau of Labor and Industries – Civil Rights Division.

## *U.S. Equal Employment Opportunity Commission*

Seattle Field Office EEOC  
Office Federal Office Building  
909 First Avenue, Suite 400  
Seattle, WA 98104-1061  
Phone Number: 1-800-669-4000

The EEOC does not maintain an office in Oregon. The Seattle Field Office is open Monday- Friday from 8:00 a.m. – 3:00 p.m.

## **C. Employment**

**Hiring:** OREA is an equal opportunity employer. Although the opportunities are limited, the Agency strives to provide equal opportunities to everyone. This biennium, the Agency hired two new employees of which both were women and one is a person with a disability. The Agency has a process in place, through the Oregon Department of Fish and Wildlife, to conduct a pay analysis for employees new to the State of Oregon in order to ensure new employees are hired fairly and equitably with regard to pay.

**Promotion:** The Agency provides employees with equal opportunities for promotion. At times, there are limited opportunities for advancement; however, in 2017, there were opportunities for five employees to promote within the Agency.

**Retention:** It is the Agency's goal for all employees to feel welcome in the workplace. By providing an environment free of any type of discrimination and harassment and providing training to employees on preventing sexual harassment and maintaining a harassment free and professional workplace, and promoting inclusion and respect in the workplace, will all help us to achieve this goal.

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**Succession Planning:** Although OREA is a small Agency, we recognize the importance of succession planning and are committed to investing equitably in our employees. At least three employees were provided the opportunity to work out of class at a higher level this biennium to help them prepare for higher level roles.

## A. Training, Education, and Development Plan (TEDP)

### a. Training Overview

OREA managers are supportive of developing staff. This includes opportunities through job rotations and/or work out of class opportunities, professional development through various trainings and workshops, etc.

### b. Employees

Three employees in the Professionals category were provided opportunities to work out of class this biennium. Two of the employees were women.

Three staff members and one manager will be attending the Association of Real Estate License Law Officials (ARELLO) Investigator Workshop in October 2018.

New OREA employees meet with the Human Resources Analyst for the Agency and review Agency policies, including the Affirmative Action (AA) Policy.

Employees have access to statewide training available on iLearn.

### c. Volunteers

All OREA volunteers are required to review the Affirmative Action policy, workplace expectations and complaint procedures.

### d. Contractors/Vendors

The Agency does not currently provide Affirmative Action training to contractors and vendors; however, they will be informed of the Agency Affirmative Action Plan and where they can view it. Contractors are expected to comply with all state and federal civil rights laws.

## B. Leadership Development/Training Program(s)

OREA does not have a formal Leadership Development Program but looks for ways to develop current staff. The Agency has not contracted out any leadership training during this biennium.

OREA currently has five managers. A number of Agency managers have attended Leadership Oregon in the past. There are currently two managers who are looking to participate in a future cohort when a spot is available. These two managers have completed the state of Oregon Emerging Manager training series. One of OREA's female managers has completed the first course toward a Certificate in Public Management at Willamette University with expected course completion in June 2019. While the Agency does not have a formal leadership strategy for the 2019-21 biennium, managers will continue

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to participate in the Manager Refresher training provided by the Oregon Department of Fish and Wildlife when available.

## C. Programs

### a. Internship Program(s)

OREA does not have a formal internship program; however, the Agency will continue to look for opportunities for interns. During spring break 2018, two temporaries were hired to scan documents for staff. Both temporaries were male and one was a person of color.

### b. Mentorship Program(s)

Due to the size of the Agency and infrequent turnover, OREA does not have a formal mentorship program. Every effort is made by managers to discuss and offer advice to employees regarding professional and career development opportunities and if the Agency experiences an increase in turnover, a mentorship program may be revisited at that time.

All OREA employees are afforded the opportunity for education and coaching. The Administrative Services Manager routes these opportunities to Division Managers on a frequent basis. Division Managers work with individual employees to match them with these opportunities. All managers identify annual training and development objectives as part of the employee performance evaluation. In addition, the Oregon Department of Fish and Wildlife's Human Resources staff is available to all OREA staff to discuss and offer advice for professional and career development opportunities.

### c. Diversity Awareness Program(s)

In December 2017, Nakeia Daniels, the Governor's Affirmative Action Manager, was invited by the Real Estate Agency to speak to their licensing staff at an offsite staff meeting. It was a great discussion about economic and business equity.

One employee from OREA participated in the State of Oregon Diversity and Inclusion Conference in 2017 and one will attend in 2018. The Agency hopes to increase future participation in the annual event when spots are available.

Two investigators (one male and one female who is a person of color) will be attending the Attorney General's Elder Abuse Conference in November 2018. We anticipate this to be a valuable training as elder abuse is a growing concern.

OREA managers and staff completed online training provided by ODFW in July 2017 titled, "Ouch! That Stereotype Hurts." This course enabled 27 staff to explore communication skills for promoting inclusion and respect in the workplace.

## G. Community Engagement

OREA does not currently have an outreach program. Staff is regularly involved in delivering continuing education to the licensing community across the state 7-10 times annually on matters related to real estate licensing and regulation. Staff also make presentations to peer regulatory agencies

# BUDGET NARRATIVE

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at the Association of Real Estate License Law Officials (ARELLO) conferences on Agency business and case management. The regulatory agencies include 46 US states, seven Canadian providences and eight countries outside of North America.

The Agency hopes to gain ideas for outreach from other agency Affirmative Action Representatives attending the Diversity & Inclusion/Affirmative Action/Equal Employment Opportunity (DI/AA/EEO) meetings.

## H. Executive Order 17-11 Updates

### a. Respectful Leadership Training (Diversity, Equity & Inclusion), and Sexual Harassment

All OREA employees are required to complete annual training related to maintaining a professional workplace as well as discrimination and harassment free workplace provided by the Department of Administrative Services. The latest training will be completed by September 2018. The two required trainings are “Maintaining a Harassment Free and Professional Workplace” and “Preventing Sexual Harassment.” These trainings support the agency’s commitment to creating and maintaining a respectful workplace free of harassment and discrimination.

OREA employees have the opportunity to participate with the Oregon Department of Fish and Wildlife’s (ODFW) refresher training on creating and maintaining a respectful workplace. In 2017, employees participated in an online cultural competency training through ODFW titled, “Ouch! That Stereotype Hurts.” This course enabled 27 learners to explore communication skills for promoting inclusion and respect in the workplace.

All OREA employees have the opportunity to attend the annual State of Oregon Diversity and Inclusion Conference.

Affirmative Action, Equity and Inclusion responsibilities have been incorporated into executive and management service position descriptions.

The Affirmative Action Policy/Diversity and Inclusion Statement will be posted on the Internet and bulletin board in the agency breakroom/kitchen area for all to see.

The Agency Affirmative Action Representative is participating in bi-monthly Governor’s Office Diversity, Equity and Inclusion/Affirmative Action meetings.

### b. [Statewide Exit Interview Survey](#)

The statewide exit interview survey is available to all employees who separate from the Agency. The Agency plans to review the results of any exit interview surveys completed by separating employees on an individual basis. Any results will be discussed at our Manager’s meetings in order to potentially identify ways in which we can improve as an Agency. The Deputy Commissioner and Commissioner are both in attendance at the Manager’s meetings. No exit interview surveys were completed by separating staff between July 1, 2017 and June 30, 2018.

### c. Performance Evaluations of all Management Personnel

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The Agency currently conducts performance evaluations of all management staff at the time of their Salary Eligibility Dates (SEDs).

In accordance with ORS 659A.012, effectiveness in achieving Affirmative Action objectives is a required component in the evaluation of performance by managers and supervisors and specific examples of a manager's or supervisor's Affirmative Action and diversity successes and achievements should be clearly described. During the 2017-2019 biennium, the Agency incorporated Affirmative Action responsibilities into performance evaluations of all management staff as a performance measure.

In addition, all position descriptions for management staff were updated during the 2017-2019 biennium to include language related to Affirmative Action, diversity, equity and inclusion.

## **I. Status of Contracts to Minority Business (ORS 659A.015)**

OREA does not have a budget specifically for contracts and has not awarded any new services and supplies contracts during the 2017-2019 Biennium. However, should a need arise to contract for services and supplies, OREA will consider the Business Oregon's Certification Office of Business Inclusion and Diversity (COBID).

## **III. Roles for Implementation of Affirmative Action Plan**

### **A. Specific, active engagement, and/or innovative activity of:**

#### **a. Directors/Administrators**

The Agency Commissioner and Deputy Commissioner set the Agency's policies concerning equal employment opportunity processes and Affirmative Action, and have overall responsibility for compliance with policy and achievement of the Affirmative Action goals to which the Agency is committed. The Commissioner and Deputy Commissioner provide leadership to Agency managers, evaluate the performance of managers to ensure their work performance reviews include Affirmative Action efforts and accomplishments. The Agency Commissioner is responsible for presenting the annual "State of the Agency" to the Oregon Association of Realtors as well as local associations.

#### **b. Managers and Supervisors**

Agency Managers and Supervisors are accountable to the Agency Deputy Commissioner and Commissioner for carrying out the Affirmative Action Plan. Managers attend traveling board meetings throughout the year in order to interact with members of the public at the meetings. They present information, statistics and updates regarding their divisions and respond to a variety of questions from licensees and/or the public related to Agency business.

#### **c. Affirmative Action Representative**

The Agency's Affirmative Action Representative has been participating in the Governor's Office of Diversity, Equity & Inclusion/Affirmative Action bi-monthly meetings/trainings. She has also attended the State of Oregon Diversity and Inclusion Conference in 2017 and will attend again in 2018.

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## IV. July 1, 2017 – June 30, 2019

### A. Accomplishments in Goal Attainment/Progress from Current Biennium’s Affirmative Action Plan

#### COMPARISON: 6/30/17 vs 6/30/18 Affirmative Action Statistics

| WOMEN<br>EEO Category         | Total Employees |           | 6/30/2017 |               | 6/30/2018 |               | 2018        |
|-------------------------------|-----------------|-----------|-----------|---------------|-----------|---------------|-------------|
|                               | 2017            | 2018      | Actual    | Parity        | Actual    | Percent       | Parity      |
| A. Officials & Administrators | 5               | 5         | 3         | 60.00%        | 3         | 60.00%        | 1.8         |
| B. Professionals              | 16              | 18        | 11        | 68.75%        | 12        | 66.67%        | 8.2         |
| F. Administrative Support     | 7               | 6         | 6         | 85.71%        | 6         | 100.00%       | 4.2         |
| <b>Totals</b>                 | <b>28</b>       | <b>29</b> | <b>20</b> | <b>71.43%</b> | <b>21</b> | <b>72.41%</b> | <b>14.2</b> |

| PEOPLE OF COLOR<br>EEO Category | Total Employees |           | 6/30/2017 |              | 6/30/2018 |              | 2018       |
|---------------------------------|-----------------|-----------|-----------|--------------|-----------|--------------|------------|
|                                 | 2017            | 2018      | Actual    | Percent      | Actual    | Percent      | Parity     |
| A. Officials & Administrators   | 5               | 5         | 0         | 0.00%        | 0         | 0.00%        | 0.5        |
| B. Professionals                | 16              | 18        | 1         | 6.25%        | 1         | 5.56%        | 1.6        |
| F. Administrative Support       | 7               | 6         | 1         | 14.29%       | 1         | 16.67%       | 0.5        |
| <b>Totals</b>                   | <b>28</b>       | <b>29</b> | <b>2</b>  | <b>7.14%</b> | <b>2</b>  | <b>6.90%</b> | <b>2.6</b> |

| PEOPLE WITH DISABILITIES<br>EEO Category | Total Employees |           | 6/30/2017 |              | 6/30/2018 |              | 2018       |
|--|-----------------|-----------|-----------|--------------|-----------|--------------|------------|
|  | 2017            | 2018      | Actual    | Percent      | Actual    | Percent      | Parity     |
| A. Officials & Administrators            | 5               | 5         | 0         | 0.00%        | 0         | 0.00%        | 0.2        |
| B. Professionals                         | 16              | 18        | 0         | 0.00%        | 0         | 0.00%        | 0.8        |
| F. Administrative Support                | 7               | 6         | 0         | 0.00%        | 1         | 16.67%       | 0.3        |
| <b>Totals</b>                            | <b>28</b>       | <b>29</b> | <b>0</b>  | <b>0.00%</b> | <b>1</b>  | <b>3.45%</b> | <b>1.3</b> |

Oregon Real Estate Agency employees are divided into three Equal Employment Opportunity job categories – Officials & Administrators, Professionals, and Administrative Support. The Agency exceeds state goals for women in all categories. The Agency currently employs two people of color. One result to highlight in 2018 was the appointment of a person with a disability in the Administrative Support Category. OREA previously employed no people with disabilities in the Agency. OREA typically has relatively low turnover and limited hiring opportunities; however, the Agency’s diversity compares favorably to the statewide Affirmative Action goals and is above parity with women and near parity with people of color:

- The comparison statistics show all 29 (FTE) positions are filled
- 72% of current employees are women
- Three (3) out of the five (5) managers are women



# BUDGET NARRATIVE

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- 2 employees have identified themselves as persons of color
- Employees with disabilities who choose to disclose this voluntary information currently comprise 3.45% of the Agency workforce

In order to possibly increase numbers of women, people of color, people with disabilities and veterans, the updated State of Oregon's Voluntary Self-Identification Form was e-mailed to staff in August 2016.

## **B. Progress Made or Lost Since Previous Biennium**

During this reporting period the Agency has continued to work toward meeting long-term Affirmative Action/diversity workforce goals. The Agency typically experiences low turnover and therefore remains relatively stable regarding Affirmative Action statistics.

The Affirmative Action comparative data through June 30, 2018 shows that the Agency is fully staffed. During the 2017-19 biennium, the Agency had some position movement in 2017 with five internal promotions, one new hire and one transfer-in from another state agency. The overall percentage of women in the Agency increased by 5.74% from 6/30/2016 to 6/30/2018. There are two persons of color on staff and now one person with a disability. The Agency continues to employ a high number of women in all EEO categories. In July of 2018, the Agency Commissioner submitted his intent to retire and a recruitment process is currently underway to fill this position. In addition, two new board members were appointed, one is a person of color and one is a woman.

## **V. July 1, 2019 – June 30, 2021**

### **A. Goals for Agency Affirmative Action Plan**

The Agency will continue to develop and maintain a work environment at OREA that is attractive to a diverse pool of applicants, retains employees, and is accepting and respectful of employees' differences, including different cultures, generations, beliefs and life experiences.

The Agency will continue to identify resources for applicant pools with qualified protected class applicants to improve the hiring and developmental opportunities for underrepresented persons. OREA has low turnover; however, when vacancies do occur, the Agency will consider diversity in hiring decisions.

The Affirmative Action Policy/Diversity and Inclusion Statement will be posted on the bulletin board in the agency breakroom/kitchen area for all to see.

OREA will review current policies related to Affirmative Action, ADA and Reasonable Accommodation, and Discrimination and Harassment Free Workplace to determine if there is a need to have specific Agency policies related to these areas.

The Agency will continue delivering continuing education to the licensing community on matters related to real estate licensing and regulation and be available to the community it serves.

OREA will promote participation at the Governor's Office of Diversity, Equity & Inclusion/Affirmative Action related trainings and workshops.

# BUDGET NARRATIVE

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## B. Strategies and Timeline for Achieving Goals

OREA will promote a work environment that recognizes, respects, and is responsive to a diverse workforce and will continue our role as an advocate for disabled individuals, which will be emphasized by our Agency programs and services. For example, the Agency currently has a number of staff that participate in religious practices outside of traditional religious practices (holidays, etc.) that are supported by the Agency with flexible or alternative work schedules to accommodate their beliefs.

OREA will work with our Human Resources business partner at the Oregon Department of Fish and Wildlife to develop a strategy for outreach when vacancies occur.

The Affirmative Action Policy and Diversity and Inclusion Statement will be posted on the Internet and bulletin board in the agency breakroom/kitchen area once the new policy is in effect.

The Agency will review current policies related to Affirmative Action, ADA and Reasonable Accommodation, and Discrimination and Harassment Free Workplace during the 2019-2021 Biennium to determine if there is a need to have specific Agency policies related to these areas.

## VI. Appendix A – [State Policy Documentation](#)

- A. [ADA and Reasonable Accommodation Policy \(Statewide Policy 50.020.10\)](#)
- B. [Discrimination and Harassment Free Workplace Policy \(Statewide Policy 50.010.01\)](#)
- C. [Employee Development and Implementation of Oregon Benchmarks for Workforce Development \(Statewide Policy 50.045.01\)](#)
- D. [Veterans Preference in Employment \(105-040-0015\)](#)
- E. [Equal Opportunity and Affirmative Action Rule \(105-040-0001\)](#)
- F. [Executive Order 17-11](#)

## VII. Appendix B – [Federal Documentation](#)

- A. [Age Discrimination in Employment Act of 1967 \(ADEA\)](#)
- B. [Disability Discrimination Title I of the Americans with Disability Act of 1990](#)
- C. [Equal Pay and Compensation Discrimination Equal Pay Act of 1963, and Title VII of the Civil Rights Act of 1964](#)
- D. [Genetic Information Discrimination Title II of the Genetic Information Nondiscrimination Act of 2008 \(GINA\)](#)
- E. [National Origin Discrimination Title VII of the Civil Rights Act of 1964](#)
- F. [Pregnancy Discrimination Title VII of the Civil Rights Act of 1964](#)
- G. [Race/Color Discrimination Title VII of the Civil Rights Act of 1964](#)
- H. [Religious Discrimination Title VII of the Civil Rights Act of 1964](#)
- I. [Retaliation Title VII of the Civil Agency Affirmative Action Policy](#)
- J. [Sex-Based Discrimination Title VII of the Civil Rights Act of 1964](#)
- K. [Sexual Harassment Title VII of the Civil Rights Act of 1964](#)

# BUDGET NARRATIVE

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## VIII. Appendix C – OREA Documentation in Support of Affirmative Action Plan

OREA relies on Oregon statewide policies and will be reviewing our policies to determine if there is a need to have specific Agency policies.

# BUDGET NARRATIVE

## *Real Estate Agency*

Summary Cross Reference Listing and Packages  
2019-21 Biennium

Agency Number: 91900  
BAM Analyst: Morse-Miller, Haylee  
Budget Coordinator: Higley, Anna - (503)378-4671

| <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                 | 040                   | 0               | Mandated Caseload                      | Essential Packages   |
| 050-00-00-00000               | Real Estate Agency                 | 081                   | 0               | September 2018 Emergency Board         | Policy Packages      |
| 050-00-00-00000               | Real Estate Agency                 | 091                   | 0               | Statewide Adjustment DAS Chgs          | Policy Packages      |
| 050-00-00-00000               | Real Estate Agency                 | 092                   | 0               | Statewide AG Adjustment                | Policy Packages      |
| 050-00-00-00000               | Real Estate Agency                 | 101                   | 0               | Compliance Specialist Reclassification | Policy Packages      |

# BUDGET NARRATIVE

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## *Real Estate Agency*

Policy Package List by Priority  
2019-21 Biennium

Agency Number: 91900

BAM Analyst: Morse-Miller, Haylee

Budget Coordinator: Higley, Anna - (503)378-4671

| <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 2018 Emergency Board         | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 091                      | Statewide Adjustment DAS Chgs          | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 092                      | Statewide AG Adjustment                | 050-00-00-00000                       | Real Estate Agency                 |
|                 | 101                      | Compliance Specialist Reclassification | 050-00-00-00000                       | Real Estate Agency                 |

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number: 91900*

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|-----------------------------------|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>BEGINNING BALANCE</b>          |                        |                                       |  |  |  |                                       |
| 0025 Beginning Balance            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 1,065,741              | 363,637                               | 363,637                                    | 1,306,593                                | 1,306,593                                | -                                     |
| <b>REVENUE CATEGORIES</b>         |                        |                                       |  |  |  |                                       |
| <b>LICENSES AND FEES</b>          |                        |                                       |  |  |  |                                       |
| 0205 Business Lic and Fees        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 6,455,811              | 8,150,232                             | 8,150,232                                  | 8,435,535                                | 8,435,535                                | -                                     |
| <b>CHARGES FOR SERVICES</b>       |                        |                                       |  |  |  |                                       |
| 0410 Charges for Services         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 3,914                  | 43,333                                | 43,333                                     | 7,794                                    | 7,794                                    | -                                     |
| <b>FINES, RENTS AND ROYALTIES</b> |                        |                                       |  |  |  |                                       |
| 0505 Fines and Forfeitures        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 41,910                 | 254,850                               | 254,850                                    | 119,760                                  | 119,760                                  | -                                     |
| 8800 General Fund Revenue         | 59,865                 | 90,000                                | 90,000                                     | 90,000                                   | 90,000                                   | -                                     |
| All Funds                         | 101,775                | 344,850                               | 344,850                                    | 209,760                                  | 209,760                                  | -                                     |
| <b>OTHER</b>                      |                        |                                       |  |  |  |                                       |
| 0975 Other Revenues               |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 1,655                  | -                                     | -  | 1,656                                    | 1,656                                    | -                                     |
| <b>REVENUE CATEGORIES</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 6,503,290              | 8,448,415                             | 8,448,415                                  | 8,564,745                                | 8,564,745                                | -                                     |
| 8800 General Fund Revenue         | 59,865                 | 90,000                                | 90,000                                     | 90,000                                   | 90,000                                   | -                                     |
| <b>TOTAL REVENUE CATEGORIES</b>   | <b>\$6,563,155</b>     | <b>\$8,538,415</b>                    | <b>\$8,538,415</b>                         | <b>\$8,654,745</b>                       | <b>\$8,654,745</b>                       | <b>-</b>                              |
| <b>TRANSFERS OUT</b>              |                        |                                       |  |  |  |                                       |

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# BUDGET NARRATIVE

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| Description                                 | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved<br>Budget | 2019-21 Agency<br>Request Budget | 2019-21<br>Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>2060 Transfer to General Fund</b>        |                    |                               |                                   |                                  |                                 |                               |
| 8800 General Fund Revenue                   | (59,865)           | (90,000)                      | (90,000)                          | (90,000)                         | (90,000)                        | -                             |
| <b>AVAILABLE REVENUES</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 7,569,031          | 8,812,052                     | 8,812,052                         | 9,871,338                        | 9,871,338                       | -                             |
| <b>TOTAL AVAILABLE REVENUES</b>             | <b>\$7,569,031</b> | <b>\$8,812,052</b>            | <b>\$8,812,052</b>                | <b>\$9,871,338</b>               | <b>\$9,871,338</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                        | 3,472,756          | 3,880,584                     | 3,995,920                         | 4,401,408                        | 4,401,408                       | -                             |
| <b>3160 Temporary Appointments</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 27,863             | 14,935                        | 14,935                            | 15,503                           | 15,503                          | -                             |
| <b>3170 Overtime Payments</b>               |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 6,094              | 2,762                         | 2,762                             | 2,867                            | 2,867                           | -                             |
| <b>3190 All Other Differential</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 13,792             | 1,538                         | 1,538                             | 1,596                            | 1,596                           | -                             |
| <b>SALARIES &amp; WAGES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 3,520,505          | 3,899,819                     | 4,015,155                         | 4,421,374                        | 4,421,374                       | -                             |
| <b>TOTAL SALARIES &amp; WAGES</b>           | <b>\$3,520,505</b> | <b>\$3,899,819</b>            | <b>\$4,015,155</b>                | <b>\$4,421,374</b>               | <b>\$4,421,374</b>              | -                             |
| <b>OTHER PAYROLL EXPENSES</b>               |                    |                               |                                   |                                  |                                 |                               |
| <b>3210 Empl. Rel. Bd. Assessments</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 1,098              | 1,596                         | 1,596                             | 1,708                            | 1,708                           | -                             |
| <b>3220 Public Employees' Retire Cont</b>   |                    |                               |                                   |                                  |                                 |                               |

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2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                       | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| 3400 Other Funds Ltd                     | 538,076                | 740,388                               | 754,111                                    | 746,577                                  | 746,577                                  | -                                     |
| <b>3221 Pension Obligation Bond</b>      |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 211,546                | 225,478                               | 220,704                                    | 248,305                                  | 248,305                                  | -                                     |
| <b>3230 Social Security Taxes</b>        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 264,274                | 296,896                               | 296,896                                    | 336,742                                  | 336,742                                  | -                                     |
| <b>3240 Unemployment Assessments</b>     |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 11,954                 | 386                                   | 386  | 401                                      | 401                                      | -                                     |
| <b>3250 Worker's Comp. Assess. (WCD)</b> |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 1,624                  | 2,001                                 | 2,001                                      | 1,682                                    | 1,682                                    | -                                     |
| <b>3260 Mass Transit Tax</b>             |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 21,111                 | 22,986                                | 22,986                                     | 26,528                                   | 26,528                                   | -                                     |
| <b>3270 Flexible Benefits</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 871,072                | 966,744                               | 1,002,588                                  | 1,020,336                                | 1,020,336                                | -                                     |
| <b>OTHER PAYROLL EXPENSES</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 1,920,755              | 2,256,475                             | 2,301,268                                  | 2,382,279                                | 2,382,279                                | -                                     |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>      | <b>\$1,920,755</b>     | <b>\$2,256,475</b>                    | <b>\$2,301,268</b>                         | <b>\$2,382,279</b>                       | <b>\$2,382,279</b>                       | <b>-</b>                              |
| <b>P.S. BUDGET ADJUSTMENTS</b>           |                        |                                       |  |  |  |                                       |
| <b>3455 Vacancy Savings</b>              |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | -                      | (194,991)                             | (194,991)                                  | (20,202)                                 | (20,202)                                 | -                                     |
| <b>PERSONAL SERVICES</b>                 |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 5,441,260              | 5,961,303                             | 6,121,432                                  | 6,783,451                                | 6,783,451                                | -                                     |
| <b>TOTAL PERSONAL SERVICES</b>           | <b>\$5,441,260</b>     | <b>\$5,961,303</b>                    | <b>\$6,121,432</b>                         | <b>\$6,783,451</b>                       | <b>\$6,783,451</b>                       | <b>-</b>                              |
| <b>SERVICES &amp; SUPPLIES</b>           |                        |                                       |  |  |  |                                       |

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*Agency Number: 91900*

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                           | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>4100 Instate Travel</b>                   |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 60,299                 | 85,439                                | 85,439                                     | 88,686                                   | 88,686                                   | -                                     |
| <b>4125 Out of State Travel</b>              |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 46,012                 | 9,707                                 | 9,707                                      | 10,076                                   | 10,076                                   | -                                     |
| <b>4150 Employee Training</b>                |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 31,458                 | 35,640                                | 35,640                                     | 36,994                                   | 36,994                                   | -                                     |
| <b>4175 Office Expenses</b>                  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 60,883                 | 113,231                               | 113,231                                    | 83,040                                   | 83,040                                   | -                                     |
| <b>4200 Telecommunications</b>               |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 55,778                 | 29,024                                | 29,024                                     | 64,621                                   | 64,621                                   | -                                     |
| <b>4225 State Gov. Service Charges</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 175,990                | 205,532                               | 205,532                                    | 250,770                                  | 233,898                                  | -                                     |
| <b>4250 Data Processing</b>                  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 99,844                 | 85,296                                | 85,296                                     | 109,297                                  | 109,297                                  | -                                     |
| <b>4275 Publicity and Publications</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 1,344                  | 55,374                                | 55,374                                     | 36,718                                   | 36,718                                   | -                                     |
| <b>4300 Professional Services</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 101,407                | 101,073                               | 101,073                                    | 105,318                                  | 105,318                                  | -                                     |
| <b>4315 IT Professional Services</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 82,775                 | 77,755                                | 77,755                                     | 81,021                                   | 81,021                                   | -                                     |
| <b>4325 Attorney General</b>                 |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 146,047                | 254,553                               | 254,553                                    | 305,820                                  | 287,624                                  | -                                     |
| <b>4375 Employee Recruitment and Develop</b> |                        |                                       |  |  |  |                                       |

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# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number: 91900*

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                         | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| 3400 Other Funds Ltd                       | 63                     | 7,464                                 | 7,464                                      | 7,748                                    | 7,748                                    | -                                     |
| <b>4400 Dues and Subscriptions</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 5,193                  | 9,224                                 | 9,224                                      | 9,575                                    | 9,575                                    | -                                     |
| <b>4425 Facilities Rental and Taxes</b>    |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 64,249                 | 245,290                               | 245,290                                    | 254,611                                  | 254,611                                  | -                                     |
| <b>4475 Facilities Maintenance</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 1,974                  | 4,354                                 | 4,354                                      | 4,519                                    | 4,519                                    | -                                     |
| <b>4575 Agency Program Related S and S</b> |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 995                    | 39,796                                | 39,796                                     | 41,308                                   | 41,308                                   | -                                     |
| <b>4650 Other Services and Supplies</b>    |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 110,203                | 116,647                               | 116,647                                    | 121,080                                  | 106,137                                  | -                                     |
| <b>4700 Expendable Prop 250 - 5000</b>     |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 129,127                | 28,081                                | 28,081                                     | 29,148                                   | 29,148                                   | -                                     |
| <b>4715 IT Expendable Property</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 112,966                | 157,006                               | 157,006                                    | 162,972                                  | 162,972                                  | -                                     |
| <b>SERVICES &amp; SUPPLIES</b>             |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 1,286,607              | 1,660,486                             | 1,660,486                                  | 1,803,322                                | 1,753,311                                | -                                     |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>       | <b>\$1,286,607</b>     | <b>\$1,660,486</b>                    | <b>\$1,660,486</b>                         | <b>\$1,803,322</b>                       | <b>\$1,753,311</b>                       | -                                     |
| <b>CAPITAL OUTLAY</b>                      |                        |                                       |  |  |  |                                       |
| <b>5600 Data Processing Hardware</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 7,700                  | -                                     | -  | -  | -  | -                                     |
| <b>EXPENDITURES</b>                        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                       | 6,735,567              | 7,621,789                             | 7,781,918                                  | 8,586,773                                | 8,536,762                                | -                                     |

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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

2019-21 Biennium

Real Estate Agency

| Description                       | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved<br>Budget | 2019-21 Agency<br>Request Budget | 2019-21<br>Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|-----------------------------------|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>TOTAL EXPENDITURES</b>         | <b>\$6,735,567</b> | <b>\$7,621,789</b>            | <b>\$7,781,918</b>                | <b>\$8,586,773</b>               | <b>\$8,536,762</b>              | -                             |
| <b>ENDING BALANCE</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd              | 833,464            | 1,190,263                     | 1,030,134                         | 1,284,565                        | 1,334,576                       | -                             |
| <b>TOTAL ENDING BALANCE</b>       | <b>\$833,464</b>   | <b>\$1,190,263</b>            | <b>\$1,030,134</b>                | <b>\$1,284,565</b>               | <b>\$1,334,576</b>              | -                             |
| <b>AUTHORIZED POSITIONS</b>       |                    |                               |                                   |                                  |                                 |                               |
| 8150 Class/Unclass Positions      | 29                 | 29                            | 29                                | 29                               | 29                              | -                             |
| <b>TOTAL AUTHORIZED POSITIONS</b> | <b>29</b>          | <b>29</b>                     | <b>29</b>                         | <b>29</b>                        | <b>29</b>                       | -                             |
| <b>AUTHORIZED FTE</b>             |                    |                               |                                   |                                  |                                 |                               |
| 8250 Class/Unclass FTE Positions  | 29.00              | 29.00                         | 29.00                             | 29.00                            | 29.00                           | -                             |
| <b>TOTAL AUTHORIZED FTE</b>       | <b>29.00</b>       | <b>29.00</b>                  | <b>29.00</b>                      | <b>29.00</b>                     | <b>29.00</b>                    | -                             |

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number: 91900*

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|-----------------------------------|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>BEGINNING BALANCE</b>          |                        |                                       |  |  |  |                                       |
| 0025 Beginning Balance            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 1,085,741              | 363,637                               | 363,637                                    | 1,306,593                                | 1,306,593                                | -                                     |
| <b>REVENUE CATEGORIES</b>         |                        |                                       |  |  |  |                                       |
| <b>LICENSES AND FEES</b>          |                        |                                       |  |  |  |                                       |
| 0205 Business Lic and Fees        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 6,455,811              | 8,150,232                             | 8,150,232                                  | 8,435,535                                | 8,435,535                                | -                                     |
| <b>CHARGES FOR SERVICES</b>       |                        |                                       |  |  |  |                                       |
| 0410 Charges for Services         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 3,914                  | 43,333                                | 43,333                                     | 7,794                                    | 7,794                                    | -                                     |
| <b>FINES, RENTS AND ROYALTIES</b> |                        |                                       |  |  |  |                                       |
| 0505 Fines and Forfeitures        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 41,910                 | 254,850                               | 254,850                                    | 119,760                                  | 119,760                                  | -                                     |
| 8800 General Fund Revenue         | 59,865                 | 90,000                                | 90,000                                     | 90,000                                   | 90,000                                   | -                                     |
| All Funds                         | 101,775                | 344,850                               | 344,850                                    | 209,760                                  | 209,760                                  | -                                     |
| <b>OTHER</b>                      |                        |                                       |  |  |  |                                       |
| 0975 Other Revenues               |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 1,655                  | -                                     | -  | 1,656                                    | 1,656                                    | -                                     |
| <b>REVENUE CATEGORIES</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd              | 6,503,290              | 8,448,415                             | 8,448,415                                  | 8,564,745                                | 8,564,745                                | -                                     |
| 8800 General Fund Revenue         | 59,865                 | 90,000                                | 90,000                                     | 90,000                                   | 90,000                                   | -                                     |
| <b>TOTAL REVENUE CATEGORIES</b>   | <b>\$6,563,155</b>     | <b>\$8,538,415</b>                    | <b>\$8,538,415</b>                         | <b>\$8,654,745</b>                       | <b>\$8,654,745</b>                       | <b>-</b>                              |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| Description                                 | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved<br>Budget | 2019-21 Agency<br>Request Budget | 2019-21<br>Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|---|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>2060 Transfer to General Fund</b>        |                    |                               |                                   |                                  |                                 |                               |
| 8800 General Fund Revenue                   | (59,865)           | (90,000)                      | (90,000)                          | (90,000)                         | (90,000)                        | -                             |
| <b>AVAILABLE REVENUES</b>                   |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 7,569,031          | 8,812,052                     | 8,812,052                         | 9,871,338                        | 9,871,338                       | -                             |
| <b>TOTAL AVAILABLE REVENUES</b>             | <b>\$7,569,031</b> | <b>\$8,812,052</b>            | <b>\$8,812,052</b>                | <b>\$9,871,338</b>               | <b>\$9,871,338</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                        | 3,472,756          | 3,880,584                     | 3,995,920                         | 4,401,408                        | 4,401,408                       | -                             |
| <b>3160 Temporary Appointments</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 27,863             | 14,935                        | 14,935                            | 15,503                           | 15,503                          | -                             |
| <b>3170 Overtime Payments</b>               |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 6,094              | 2,762                         | 2,762                             | 2,867                            | 2,867                           | -                             |
| <b>3190 All Other Differential</b>          |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 13,792             | 1,538                         | 1,538                             | 1,596                            | 1,596                           | -                             |
| <b>SALARIES &amp; WAGES</b>                 |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 3,520,505          | 3,899,819                     | 4,015,155                         | 4,421,374                        | 4,421,374                       | -                             |
| <b>TOTAL SALARIES &amp; WAGES</b>           | <b>\$3,520,505</b> | <b>\$3,899,819</b>            | <b>\$4,015,155</b>                | <b>\$4,421,374</b>               | <b>\$4,421,374</b>              | -                             |
| <b>OTHER PAYROLL EXPENSES</b>               |                    |                               |                                   |                                  |                                 |                               |
| <b>3210 Empl. Rel. Bd. Assessments</b>      |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                        | 1,098              | 1,596                         | 1,596                             | 1,708                            | 1,708                           | -                             |
| <b>3220 Public Employees' Retire Cont</b>   |                    |                               |                                   |                                  |                                 |                               |

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*Real Estate Agency*

*Agency Number: 91900*

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                       | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| 3400 Other Funds Ltd                     | 538,076                | 740,388                               | 754,111                                    | 746,577                                  | 746,577                                  | -                                     |
| <b>3221 Pension Obligation Bond</b>      |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 211,546                | 225,478                               | 220,704                                    | 248,305                                  | 248,305                                  | -                                     |
| <b>3230 Social Security Taxes</b>        |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 264,274                | 296,896                               | 296,896                                    | 336,742                                  | 336,742                                  | -                                     |
| <b>3240 Unemployment Assessments</b>     |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 11,954                 | 386                                   | 386  | 401                                      | 401                                      | -                                     |
| <b>3250 Worker's Comp. Assess. (WCD)</b> |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 1,624                  | 2,001                                 | 2,001                                      | 1,682                                    | 1,682                                    | -                                     |
| <b>3260 Mass Transit Tax</b>             |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 21,111                 | 22,986                                | 22,986                                     | 26,528                                   | 26,528                                   | -                                     |
| <b>3270 Flexible Benefits</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 871,072                | 966,744                               | 1,002,588                                  | 1,020,336                                | 1,020,336                                | -                                     |
| <b>OTHER PAYROLL EXPENSES</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 1,920,755              | 2,256,475                             | 2,301,268                                  | 2,382,279                                | 2,382,279                                | -                                     |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>      | <b>\$1,920,755</b>     | <b>\$2,256,475</b>                    | <b>\$2,301,268</b>                         | <b>\$2,382,279</b>                       | <b>\$2,382,279</b>                       | <b>-</b>                              |
| <b>P.S. BUDGET ADJUSTMENTS</b>           |                        |                                       |  |  |  |                                       |
| <b>3455 Vacancy Savings</b>              |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | -                      | (194,991)                             | (194,991)                                  | (20,202)                                 | (20,202)                                 | -                                     |
| <b>PERSONAL SERVICES</b>                 |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                     | 5,441,260              | 5,961,303                             | 6,121,432                                  | 6,783,451                                | 6,783,451                                | -                                     |
| <b>TOTAL PERSONAL SERVICES</b>           | <b>\$5,441,260</b>     | <b>\$5,961,303</b>                    | <b>\$6,121,432</b>                         | <b>\$6,783,451</b>                       | <b>\$6,783,451</b>                       | <b>-</b>                              |
| <b>SERVICES &amp; SUPPLIES</b>           |                        |                                       |  |  |  |                                       |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| <i>Description</i>                           | <i>2015-17 Actuals</i> | <i>2017-19 Leg<br/>Adopted Budget</i> | <i>2017-19 Leg<br/>Approved<br/>Budget</i> | <i>2019-21 Agency<br/>Request Budget</i> | <i>2019-21<br/>Governor's<br/>Budget</i> | <i>2019-21 Leg.<br/>Adopted Audit</i> |
|--|------------------------|---------------------------------------|--|--|--|---------------------------------------|
| <b>4100 Instate Travel</b>                   |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 60,299                 | 85,439                                | 85,439                                     | 88,686                                   | 88,686                                   | -                                     |
| <b>4125 Out of State Travel</b>              |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 46,012                 | 9,707                                 | 9,707                                      | 10,076                                   | 10,076                                   | -                                     |
| <b>4150 Employee Training</b>                |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 31,458                 | 35,640                                | 35,640                                     | 36,994                                   | 36,994                                   | -                                     |
| <b>4175 Office Expenses</b>                  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 60,883                 | 113,231                               | 113,231                                    | 83,040                                   | 83,040                                   | -                                     |
| <b>4200 Telecommunications</b>               |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 55,778                 | 29,024                                | 29,024                                     | 64,621                                   | 64,621                                   | -                                     |
| <b>4225 State Gov. Service Charges</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 175,990                | 205,532                               | 205,532                                    | 250,770                                  | 233,898                                  | -                                     |
| <b>4250 Data Processing</b>                  |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 99,844                 | 85,296                                | 85,296                                     | 109,297                                  | 109,297                                  | -                                     |
| <b>4275 Publicity and Publications</b>       |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 1,344                  | 55,374                                | 55,374                                     | 36,718                                   | 36,718                                   | -                                     |
| <b>4300 Professional Services</b>            |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 101,407                | 101,073                               | 101,073                                    | 105,318                                  | 105,318                                  | -                                     |
| <b>4315 IT Professional Services</b>         |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 82,775                 | 77,755                                | 77,755                                     | 81,021                                   | 81,021                                   | -                                     |
| <b>4325 Attorney General</b>                 |                        |                                       |  |  |  |                                       |
| 3400 Other Funds Ltd                         | 146,047                | 254,553                               | 254,553                                    | 305,820                                  | 287,624                                  | -                                     |
| <b>4375 Employee Recruitment and Develop</b> |                        |                                       |  |  |  |                                       |

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number: 91900*

Budget Support - Detail Revenues and Expenditures  
2019-21 Biennium  
Real Estate Agency

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

| Description                                | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved<br>Budget | 2019-21 Agency<br>Request Budget | 2019-21<br>Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|--|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| 3400 Other Funds Ltd                       | 63                 | 7,464                         | 7,464                             | 7,748                            | 7,748                           | -                             |
| <b>4400 Dues and Subscriptions</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 5,193              | 9,224                         | 9,224                             | 9,575                            | 9,575                           | -                             |
| <b>4425 Facilities Rental and Taxes</b>    |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 64,249             | 245,290                       | 245,290                           | 254,611                          | 254,611                         | -                             |
| <b>4475 Facilities Maintenance</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 1,974              | 4,354                         | 4,354                             | 4,519                            | 4,519                           | -                             |
| <b>4575 Agency Program Related S and S</b> |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 995                | 39,796                        | 39,796                            | 41,308                           | 41,308                          | -                             |
| <b>4650 Other Services and Supplies</b>    |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 110,203            | 116,647                       | 116,647                           | 121,080                          | 106,137                         | -                             |
| <b>4700 Expendable Prop 250 - 5000</b>     |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 129,127            | 28,081                        | 28,081                            | 29,148                           | 29,148                          | -                             |
| <b>4715 IT Expendable Property</b>         |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 112,966            | 157,006                       | 157,006                           | 162,972                          | 162,972                         | -                             |
| <b>SERVICES &amp; SUPPLIES</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 1,286,607          | 1,660,486                     | 1,660,486                         | 1,803,322                        | 1,753,311                       | -                             |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>       | <b>\$1,286,607</b> | <b>\$1,660,486</b>            | <b>\$1,660,486</b>                | <b>\$1,803,322</b>               | <b>\$1,753,311</b>              | -                             |
| <b>CAPITAL OUTLAY</b>                      |                    |                               |                                   |                                  |                                 |                               |
| <b>5600 Data Processing Hardware</b>       |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 7,700              | -                             | -                                 | -                                | -                               | -                             |
| <b>EXPENDITURES</b>                        |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd                       | 6,735,567          | 7,621,789                     | 7,781,918                         | 8,586,773                        | 8,536,762                       | -                             |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Budget Support - Detail Revenues and Expenditures  
 2019-21 Biennium  
 Real Estate Agency

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

| Description                       | 2015-17 Actuals    | 2017-19 Leg<br>Adopted Budget | 2017-19 Leg<br>Approved<br>Budget | 2019-21 Agency<br>Request Budget | 2019-21<br>Governor's<br>Budget | 2019-21 Leg.<br>Adopted Audit |
|-----------------------------------|--------------------|-------------------------------|-----------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <b>TOTAL EXPENDITURES</b>         | <b>\$6,735,567</b> | <b>\$7,621,789</b>            | <b>\$7,781,918</b>                | <b>\$8,586,773</b>               | <b>\$8,536,762</b>              | -                             |
| <b>ENDING BALANCE</b>             |                    |                               |                                   |                                  |                                 |                               |
| 3400 Other Funds Ltd              | 833,464            | 1,190,263                     | 1,030,134                         | 1,284,565                        | 1,334,576                       | -                             |
| <b>TOTAL ENDING BALANCE</b>       | <b>\$833,464</b>   | <b>\$1,190,263</b>            | <b>\$1,030,134</b>                | <b>\$1,284,565</b>               | <b>\$1,334,576</b>              | -                             |
| <b>AUTHORIZED POSITIONS</b>       |                    |                               |                                   |                                  |                                 |                               |
| 8150 Class/Unclass Positions      | 29                 | 29                            | 29                                | 29                               | 29                              | -                             |
| <b>TOTAL AUTHORIZED POSITIONS</b> | <b>29</b>          | <b>29</b>                     | <b>29</b>                         | <b>29</b>                        | <b>29</b>                       | -                             |
| <b>AUTHORIZED FTE</b>             |                    |                               |                                   |                                  |                                 |                               |
| 8250 Class/Unclass FTE Positions  | 29.00              | 29.00                         | 29.00                             | 29.00                            | 29.00                           | -                             |
| <b>TOTAL AUTHORIZED FTE</b>       | <b>29.00</b>       | <b>29.00</b>                  | <b>29.00</b>                      | <b>29.00</b>                     | <b>29.00</b>                    | -                             |

# BUDGET NARRATIVE

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail  
 2019-21 Biennium  
 Real Estate Agency

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

| Description                       | Agency Request<br>Budget (V-01)<br>2019-21 Base Budget | Governor's Budget<br>(Y-01)<br>2019-21 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|-----------------------------------|--|--|----------------------------|---------------------------------------|
|                                   | Column 1   | Column 2   |                            |                                       |
| <b>BEGINNING BALANCE</b>          |  |  |                            |                                       |
| 0025 Beginning Balance            |  |  |                            |                                       |
| 3400 Other Funds Ltd              | 1,306,593  | 1,306,593  | 0                          | -                                     |
| <b>REVENUE CATEGORIES</b>         |  |  |                            |                                       |
| <b>LICENSES AND FEES</b>          |  |  |                            |                                       |
| 0205 Business Lic and Fees        |  |  |                            |                                       |
| 3400 Other Funds Ltd              | 8,435,535  | 8,435,535  | 0                          | -                                     |
| <b>CHARGES FOR SERVICES</b>       |  |  |                            |                                       |
| 0410 Charges for Services         |  |  |                            |                                       |
| 3400 Other Funds Ltd              | 7,794  | 7,794  | 0                          | -                                     |
| <b>FINES, RENTS AND ROYALTIES</b> |  |  |                            |                                       |
| 0505 Fines and Forfeitures        |  |  |                            |                                       |
| 3400 Other Funds Ltd              | 119,760  | 119,760  | 0                          | -                                     |
| 8800 General Fund Revenue         | 90,000   | 90,000   | 0                          | -                                     |
| All Funds                         | 209,760  | 209,760  | 0                          | -                                     |
| <b>OTHER</b>                      |  |  |                            |                                       |
| 0975 Other Revenues               |  |  |                            |                                       |
| 3400 Other Funds Ltd              | 1,656  | 1,656  | 0                          | -                                     |
| <b>TOTAL REVENUES</b>             |  |  |                            |                                       |
| 3400 Other Funds Ltd              | 8,564,745  | 8,564,745  | 0                          | -                                     |
| 8800 General Fund Revenue         | 90,000   | 90,000   | 0                          | -                                     |
| <b>TOTAL REVENUES</b>             | <b>\$8,654,745</b>                                     | <b>\$8,654,745</b>                                 | <b>0</b>                   | <b>-</b>                              |
| <b>TRANSFERS OUT</b>              |  |  |                            |                                       |
| 2060 Transfer to General Fund     |  |  |                            |                                       |

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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

2019-21 Biennium

Real Estate Agency

| Description                                 | Agency Request<br>Budget (V-01)<br>2019-21 Base Budget | Governor's Budget<br>(Y-01)<br>2019-21 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|---|--|--|----------------------------|---------------------------------------|
|   | Column 1   | Column 2   |                            |                                       |
| 8800 General Fund Revenue                   | (90,000)   | (90,000)   | 0                          | -                                     |
| <b>AVAILABLE REVENUES</b>                   |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 9,871,338  | 9,871,338  | 0                          | -                                     |
| <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                        | 4,401,408  | 4,401,408  | 0                          | -                                     |
| <b>3160 Temporary Appointments</b>          |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 14,935   | 14,935   | 0                          | -                                     |
| <b>3170 Overtime Payments</b>               |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 2,762  | 2,762  | 0                          | -                                     |
| <b>3190 All Other Differential</b>          |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 1,538  | 1,538  | 0                          | -                                     |
| <b>TOTAL SALARIES &amp; WAGES</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 4,420,643  | 4,420,643  | 0                          | -                                     |
| <b>OTHER PAYROLL EXPENSES</b>               |  |  |                            |                                       |
| <b>3210 Empl. Rel. Bd. Assessments</b>      |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 1,708  | 1,708  | 0                          | -                                     |
| <b>3220 Public Employees' Retire Cont</b>   |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 746,549  | 746,549  | 0                          | -                                     |
| <b>3221 Pension Obligation Bond</b>         |  |  |                            |                                       |
| 3400 Other Funds Ltd                        | 220,704  | 220,704  | 0                          | -                                     |
| <b>3230 Social Security Taxes</b>           |  |  |                            |                                       |

# BUDGET NARRATIVE

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail  
 2019-21 Biennium  
 Real Estate Agency

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

| Description                              | Agency Request<br>Budget (V-01)<br>2019-21 Base Budget | Governor's Budget<br>(Y-01)<br>2019-21 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--|--|--|----------------------------|---------------------------------------|
|  | Column 1   | Column 2   |                            |                                       |
| 3400 Other Funds Ltd                     | 336,687  | 336,687  | 0                          | -                                     |
| <b>3240 Unemployment Assessments</b>     |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 386  | 386  | 0                          | -                                     |
| <b>3250 Worker's Comp. Assess. (WCD)</b> |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 1,682  | 1,682  | 0                          | -                                     |
| <b>3260 Mass Transit Tax</b>             |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 22,986   | 22,986   | 0                          | -                                     |
| <b>3270 Flexible Benefits</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 1,020,336  | 1,020,336  | 0                          | -                                     |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>      |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 2,351,038  | 2,351,038  | 0                          | -                                     |
| <b>P.S. BUDGET ADJUSTMENTS</b>           |  |  |                            |                                       |
| <b>3455 Vacancy Savings</b>              |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | (194,991)  | (194,991)  | 0                          | -                                     |
| <b>TOTAL PERSONAL SERVICES</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 6,576,690  | 6,576,690  | 0                          | -                                     |
| <b>SERVICES &amp; SUPPLIES</b>           |  |  |                            |                                       |
| <b>4100 Instate Travel</b>               |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 85,439   | 85,439   | 0                          | -                                     |
| <b>4125 Out of State Travel</b>          |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 9,707  | 9,707  | 0                          | -                                     |
| <b>4150 Employee Training</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                     | 35,640   | 35,640   | 0                          | -                                     |
| <b>4175 Office Expenses</b>              |  |  |                            |                                       |

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# BUDGET NARRATIVE

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail  
 2019-21 Biennium  
 Real Estate Agency

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

| Description                                  | Agency Request<br>Budget (V-01)<br>2019-21 Base Budget | Governor's Budget<br>(Y-01)<br>2019-21 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|--|--|--|----------------------------|---------------------------------------|
|  | Column 1   | Column 2   |                            |                                       |
| 3400 Other Funds Ltd                         | 80,000   | 80,000   | 0                          | -                                     |
| <b>4200 Telecommunications</b>               |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 62,255   | 62,255   | 0                          | -                                     |
| <b>4225 State Gov. Service Charges</b>       |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 205,532  | 205,532  | 0                          | -                                     |
| <b>4250 Data Processing</b>                  |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 105,298  | 105,298  | 0                          | -                                     |
| <b>4275 Publicity and Publications</b>       |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 35,374   | 35,374   | 0                          | -                                     |
| <b>4300 Professional Services</b>            |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 101,073  | 101,073  | 0                          | -                                     |
| <b>4315 IT Professional Services</b>         |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 77,755   | 77,755   | 0                          | -                                     |
| <b>4325 Attorney General</b>                 |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 254,553  | 254,553  | 0                          | -                                     |
| <b>4375 Employee Recruitment and Develop</b> |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 7,464  | 7,464  | 0                          | -                                     |
| <b>4400 Dues and Subscriptions</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 9,224  | 9,224  | 0                          | -                                     |
| <b>4425 Facilities Rental and Taxes</b>      |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 245,290  | 245,290  | 0                          | -                                     |
| <b>4475 Facilities Maintenance</b>           |  |  |                            |                                       |
| 3400 Other Funds Ltd                         | 4,354  | 4,354  | 0                          | -                                     |
| <b>4575 Agency Program Related S and S</b>   |  |  |                            |                                       |

# BUDGET NARRATIVE

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail  
 2019-21 Biennium  
 Real Estate Agency

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

| Description                             | Agency Request<br>Budget (V-01)<br>2019-21 Base Budget | Governor's Budget<br>(Y-01)<br>2019-21 Base Budget | Column 2 minus<br>Column 1 | % Change from<br>Column 1 to Column 2 |
|---|--|--|----------------------------|---------------------------------------|
|   | Column 1   | Column 2   |                            |                                       |
| 3400 Other Funds Ltd                    | 39,796   | 39,796   | 0                          | -                                     |
| <b>4650 Other Services and Supplies</b> |  |  |                            |                                       |
| 3400 Other Funds Ltd                    | 116,647  | 116,647  | 0                          | -                                     |
| <b>4700 Expendable Prop 250 - 5000</b>  |  |  |                            |                                       |
| 3400 Other Funds Ltd                    | 28,081   | 28,081   | 0                          | -                                     |
| <b>4715 IT Expendable Property</b>      |  |  |                            |                                       |
| 3400 Other Funds Ltd                    | 157,006  | 157,006  | 0                          | -                                     |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>    |  |  |                            |                                       |
| 3400 Other Funds Ltd                    | 1,660,486  | 1,660,486  | 0                          | -                                     |
| <b>TOTAL EXPENDITURES</b>               |  |  |                            |                                       |
| 3400 Other Funds Ltd                    | 8,237,176  | 8,237,176  | 0                          | -                                     |
| <b>ENDING BALANCE</b>                   |  |  |                            |                                       |
| 3400 Other Funds Ltd                    | 1,634,162  | 1,634,162  | 0                          | -                                     |
| <b>AUTHORIZED POSITIONS</b>             |  |  |                            |                                       |
| 8150 Class/Unclass Positions            | 29   | 29   | 0                          | -                                     |
| <b>AUTHORIZED FTE</b>                   |  |  |                            |                                       |
| 8250 Class/Unclass FTE Positions        | 29.00  | 29.00  | 0                          | -                                     |

# BUDGET NARRATIVE

Real Estate Agency

Agency Number: 91900

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description                       | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|-----------------------------------|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| <b>BEGINNING BALANCE</b>          |                     |                    |                               |                 |                              |
| 0025 Beginning Balance            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 1,306,593           | -                  | 1,306,593                     | -               | 1,306,593                    |
| <b>REVENUE CATEGORIES</b>         |                     |                    |                               |                 |                              |
| <b>LICENSES AND FEES</b>          |                     |                    |                               |                 |                              |
| 0205 Business Lic and Fees        |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 8,435,535           | -                  | 8,435,535                     | -               | 8,435,535                    |
| <b>CHARGES FOR SERVICES</b>       |                     |                    |                               |                 |                              |
| 0410 Charges for Services         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 7,794               | -                  | 7,794                         | -               | 7,794                        |
| <b>FINES, RENTS AND ROYALTIES</b> |                     |                    |                               |                 |                              |
| 0505 Fines and Forfeitures        |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 119,760             | -                  | 119,760                       | -               | 119,760                      |
| 8800 General Fund Revenue         | 90,000              | -                  | 90,000                        | -               | 90,000                       |
| All Funds                         | 209,760             | -                  | 209,760                       | -               | 209,760                      |
| <b>OTHER</b>                      |                     |                    |                               |                 |                              |
| 0975 Other Revenues               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 1,856               | -                  | 1,856                         | -               | 1,856                        |
| <b>TOTAL REVENUES</b>             |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 8,564,745           | -                  | 8,564,745                     | -               | 8,564,745                    |
| 8800 General Fund Revenue         | 90,000              | -                  | 90,000                        | -               | 90,000                       |
| <b>TOTAL REVENUES</b>             | <b>\$8,654,745</b>  | <b>-</b>           | <b>\$8,654,745</b>            | <b>-</b>        | <b>\$8,654,745</b>           |
| <b>TRANSFERS OUT</b>              |                     |                    |                               |                 |                              |

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number: 91900*

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description                          | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--------------------------------------|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| 2060 Transfer to General Fund        |                     |                    |                               |                 |                              |
| 8800 General Fund Revenue            | (90,000)            | -                  | (90,000)                      | -               | (90,000)                     |
| <b>AVAILABLE REVENUES</b>            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 9,871,338           | -                  | 9,871,338                     | -               | 9,871,338                    |
| <b>EXPENDITURES</b>                  |                     |                    |                               |                 |                              |
| <b>PERSONAL SERVICES</b>             |                     |                    |                               |                 |                              |
| <b>SALARIES &amp; WAGES</b>          |                     |                    |                               |                 |                              |
| 3110 Class/Unclass Sal. and Per Diem |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 4,401,408           | -                  | 4,401,408                     | -               | 4,401,408                    |
| 3160 Temporary Appointments          |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 14,935              | 568                | 15,503                        | -               | 15,503                       |
| 3170 Overtime Payments               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 2,762               | 105                | 2,867                         | -               | 2,867                        |
| 3190 All Other Differential          |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 1,538               | 58                 | 1,596                         | -               | 1,596                        |
| <b>TOTAL SALARIES &amp; WAGES</b>    |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 4,420,643           | 731                | 4,421,374                     | -               | 4,421,374                    |
| <b>OTHER PAYROLL EXPENSES</b>        |                     |                    |                               |                 |                              |
| 3210 Empl. Rel. Bd. Assessments      |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 1,708               | -                  | 1,708                         | -               | 1,708                        |
| 3220 Public Employees' Retire Cont   |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 746,549             | 28                 | 746,577                       | -               | 746,577                      |
| 3221 Pension Obligation Bond         |                     |                    |                               |                 |                              |

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BDV002A



# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description                              | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| 3400 Other Funds Ltd                     | 220,704             | 27,601             | 248,305                       | -               | 248,305                      |
| <b>3230 Social Security Taxes</b>        |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 336,687             | 55                 | 336,742                       | -               | 336,742                      |
| <b>3240 Unemployment Assessments</b>     |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 386                 | 15                 | 401                           | -               | 401                          |
| <b>3250 Worker's Comp. Assess. (WCD)</b> |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 1,682               | -                  | 1,682                         | -               | 1,682                        |
| <b>3260 Mass Transit Tax</b>             |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 22,986              | 3,542              | 26,528                        | -               | 26,528                       |
| <b>3270 Flexible Benefits</b>            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 1,020,336           | -                  | 1,020,336                     | -               | 1,020,336                    |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>      |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 2,351,038           | 31,241             | 2,382,279                     | -               | 2,382,279                    |
| <b>P.S. BUDGET ADJUSTMENTS</b>           |                     |                    |                               |                 |                              |
| <b>3455 Vacancy Savings</b>              |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | (194,991)           | 174,789            | (20,202)                      | -               | (20,202)                     |
| <b>TOTAL PERSONAL SERVICES</b>           |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 6,576,690           | 206,761            | 6,783,451                     | -               | 6,783,451                    |
| <b>SERVICES &amp; SUPPLIES</b>           |                     |                    |                               |                 |                              |
| <b>4100 Instate Travel</b>               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 85,439              | 3,247              | 88,686                        | -               | 88,686                       |
| <b>4125 Out of State Travel</b>          |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 9,707               | 369                | 10,076                        | -               | 10,076                       |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
 2019-21 Biennium  
 Real Estate Agency

Version: V - 01 - Agency Request Budget  
 Cross Reference Number: 91900-000-00-00-00000

| Description                                  | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| <b>4150 Employee Training</b>                |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 35,640              | 1,354              | 36,994                        | -               | 36,994                       |
| <b>4175 Office Expenses</b>                  |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 80,000              | 3,040              | 83,040                        | -               | 83,040                       |
| <b>4200 Telecommunications</b>               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 62,255              | 2,366              | 64,621                        | -               | 64,621                       |
| <b>4225 State Gov. Service Charges</b>       |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 205,532             | 45,238             | 250,770                       | -               | 250,770                      |
| <b>4250 Data Processing</b>                  |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 105,296             | 4,001              | 109,297                       | -               | 109,297                      |
| <b>4275 Publicity and Publications</b>       |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 35,374              | 1,344              | 36,718                        | -               | 36,718                       |
| <b>4300 Professional Services</b>            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 101,073             | 4,245              | 105,318                       | -               | 105,318                      |
| <b>4315 IT Professional Services</b>         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 77,755              | 3,266              | 81,021                        | -               | 81,021                       |
| <b>4325 Attorney General</b>                 |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 254,553             | 51,267             | 305,820                       | -               | 305,820                      |
| <b>4375 Employee Recruitment and Develop</b> |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 7,464               | 284                | 7,748                         | -               | 7,748                        |
| <b>4400 Dues and Subscriptions</b>           |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 9,224               | 351                | 9,575                         | -               | 9,575                        |
| <b>4425 Facilities Rental and Taxes</b>      |                     |                    |                               |                 |                              |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
 2019-21 Biennium  
 Real Estate Agency

Version: V - 01 - Agency Request Budget  
 Cross Reference Number: 91900-000-00-00-00000

| Description                                | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| 3400 Other Funds Ltd                       | 245,290             | 9,321              | 254,611                       | -               | 254,611                      |
| <b>4475 Facilities Maintenance</b>         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 4,354               | 165                | 4,519                         | -               | 4,519                        |
| <b>4575 Agency Program Related S and S</b> |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 39,798              | 1,512              | 41,308                        | -               | 41,308                       |
| <b>4650 Other Services and Supplies</b>    |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 116,647             | 4,433              | 121,080                       | -               | 121,080                      |
| <b>4700 Expendable Prop 250 - 5000</b>     |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 28,081              | 1,067              | 29,148                        | -               | 29,148                       |
| <b>4715 IT Expendable Property</b>         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 157,006             | 5,966              | 162,972                       | -               | 162,972                      |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>       |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 1,660,486           | 142,836            | 1,803,322                     | -               | 1,803,322                    |
| <b>TOTAL EXPENDITURES</b>                  |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 8,237,176           | 349,597            | 8,586,773                     | -               | 8,586,773                    |
| <b>ENDING BALANCE</b>                      |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 1,634,162           | (349,597)          | 1,284,565                     | -               | 1,284,565                    |
| <b>AUTHORIZED POSITIONS</b>                |                     |                    |                               |                 |                              |
| 8150 Class/Unclass Positions               | 29                  | -                  | 29                            | -               | 29                           |
| <b>AUTHORIZED FTE</b>                      |                     |                    |                               |                 |                              |
| 8250 Class/Unclass FTE Positions           | 29.00               | -                  | 29.00                         | -               | 29.00                        |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                       | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|-----------------------------------|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| <b>BEGINNING BALANCE</b>          |                     |                    |                               |                 |                              |
| 0025 Beginning Balance            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 1,306,593           | -                  | 1,306,593                     | -               | 1,306,593                    |
| <b>REVENUE CATEGORIES</b>         |                     |                    |                               |                 |                              |
| <b>LICENSES AND FEES</b>          |                     |                    |                               |                 |                              |
| 0205 Business Lic and Fees        |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 8,435,535           | -                  | 8,435,535                     | -               | 8,435,535                    |
| <b>CHARGES FOR SERVICES</b>       |                     |                    |                               |                 |                              |
| 0410 Charges for Services         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 7,794               | -                  | 7,794                         | -               | 7,794                        |
| <b>FINES, RENTS AND ROYALTIES</b> |                     |                    |                               |                 |                              |
| 0505 Fines and Forfeitures        |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 119,760             | -                  | 119,760                       | -               | 119,760                      |
| 8800 General Fund Revenue         | 90,000              | -                  | 90,000                        | -               | 90,000                       |
| All Funds                         | 209,760             | -                  | 209,760                       | -               | 209,760                      |
| <b>OTHER</b>                      |                     |                    |                               |                 |                              |
| 0975 Other Revenues               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 1,656               | -                  | 1,656                         | -               | 1,656                        |
| <b>TOTAL REVENUES</b>             |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd              | 8,564,745           | -                  | 8,564,745                     | -               | 8,564,745                    |
| 8800 General Fund Revenue         | 90,000              | -                  | 90,000                        | -               | 90,000                       |
| <b>TOTAL REVENUES</b>             | <b>\$8,654,745</b>  | <b>-</b>           | <b>\$8,654,745</b>            | <b>-</b>        | <b>\$8,654,745</b>           |
| <b>TRANSFERS OUT</b>              |                     |                    |                               |                 |                              |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                          | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--------------------------------------|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| 2060 Transfer to General Fund        |                     |                    |                               |                 |                              |
| 8800 General Fund Revenue            | (90,000)            | -                  | (90,000)                      | -               | (90,000)                     |
| <b>AVAILABLE REVENUES</b>            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 9,871,338           | -                  | 9,871,338                     | -               | 9,871,338                    |
| <b>EXPENDITURES</b>                  |                     |                    |                               |                 |                              |
| <b>PERSONAL SERVICES</b>             |                     |                    |                               |                 |                              |
| <b>SALARIES &amp; WAGES</b>          |                     |                    |                               |                 |                              |
| 3110 Class/Unclass Sal. and Per Diem |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 4,401,408           | -                  | 4,401,408                     | -               | 4,401,408                    |
| 3160 Temporary Appointments          |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 14,935              | 568                | 15,503                        | -               | 15,503                       |
| 3170 Overtime Payments               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 2,762               | 105                | 2,867                         | -               | 2,867                        |
| 3190 All Other Differential          |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 1,538               | 58                 | 1,596                         | -               | 1,596                        |
| <b>TOTAL SALARIES &amp; WAGES</b>    |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 4,420,643           | 731                | 4,421,374                     | -               | 4,421,374                    |
| <b>OTHER PAYROLL EXPENSES</b>        |                     |                    |                               |                 |                              |
| 3210 Empl. Rel. Bd. Assessments      |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 1,708               | -                  | 1,708                         | -               | 1,708                        |
| 3220 Public Employees' Retire Cont   |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                 | 746,549             | 28                 | 746,577                       | -               | 746,577                      |
| 3221 Pension Obligation Bond         |                     |                    |                               |                 |                              |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                              | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| 3400 Other Funds Ltd                     | 220,704             | 27,601             | 248,305                       | -               | 248,305                      |
| <b>3230 Social Security Taxes</b>        |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 336,687             | 55                 | 336,742                       | -               | 336,742                      |
| <b>3240 Unemployment Assessments</b>     |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 386                 | 15                 | 401                           | -               | 401                          |
| <b>3250 Worker's Comp. Assess. (WCD)</b> |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 1,682               | -                  | 1,682                         | -               | 1,682                        |
| <b>3260 Mass Transit Tax</b>             |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 22,986              | 3,542              | 26,528                        | -               | 26,528                       |
| <b>3270 Flexible Benefits</b>            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 1,020,336           | -                  | 1,020,336                     | -               | 1,020,336                    |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>      |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 2,351,038           | 31,241             | 2,382,279                     | -               | 2,382,279                    |
| <b>P.S. BUDGET ADJUSTMENTS</b>           |                     |                    |                               |                 |                              |
| <b>3455 Vacancy Savings</b>              |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | (194,991)           | 174,789            | (20,202)                      | -               | (20,202)                     |
| <b>TOTAL PERSONAL SERVICES</b>           |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 6,576,690           | 206,761            | 6,783,451                     | -               | 6,783,451                    |
| <b>SERVICES &amp; SUPPLIES</b>           |                     |                    |                               |                 |                              |
| <b>4100 Instate Travel</b>               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 85,439              | 3,247              | 88,686                        | -               | 88,686                       |
| <b>4125 Out of State Travel</b>          |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                     | 9,707               | 369                | 10,076                        | -               | 10,076                       |

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# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                                  | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| <b>4150 Employee Training</b>                |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 35,640              | 1,354              | 36,994                        | -               | 36,994                       |
| <b>4175 Office Expenses</b>                  |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 80,000              | 3,040              | 83,040                        | -               | 83,040                       |
| <b>4200 Telecommunications</b>               |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 62,255              | 2,366              | 64,621                        | -               | 64,621                       |
| <b>4225 State Gov. Service Charges</b>       |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 205,532             | 45,238             | 250,770                       | -               | 250,770                      |
| <b>4250 Data Processing</b>                  |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 105,296             | 4,001              | 109,297                       | -               | 109,297                      |
| <b>4275 Publicity and Publications</b>       |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 35,374              | 1,344              | 36,718                        | -               | 36,718                       |
| <b>4300 Professional Services</b>            |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 101,073             | 4,245              | 105,318                       | -               | 105,318                      |
| <b>4315 IT Professional Services</b>         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 77,755              | 3,266              | 81,021                        | -               | 81,021                       |
| <b>4325 Attorney General</b>                 |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 254,553             | 51,267             | 305,820                       | -               | 305,820                      |
| <b>4375 Employee Recruitment and Develop</b> |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 7,464               | 284                | 7,748                         | -               | 7,748                        |
| <b>4400 Dues and Subscriptions</b>           |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                         | 9,224               | 351                | 9,575                         | -               | 9,575                        |
| <b>4425 Facilities Rental and Taxes</b>      |                     |                    |                               |                 |                              |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number: 91900**

Detail Revenues & Expenditures - Requested Budget  
 2019-21 Biennium  
 Real Estate Agency

Version: V - 01 - Agency Request Budget  
 Cross Reference Number: 91900-050-00-00-00000

| Description                                | 2019-21 Base Budget | Essential Packages | 2019-21 Current Service Level | Policy Packages | 2019-21 Agency Request Audit |
|--|---------------------|--------------------|-------------------------------|-----------------|------------------------------|
| 3400 Other Funds Ltd                       | 245,290             | 9,321              | 254,611                       | -               | 254,611                      |
| <b>4475 Facilities Maintenance</b>         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 4,354               | 165                | 4,519                         | -               | 4,519                        |
| <b>4575 Agency Program Related S and S</b> |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 39,796              | 1,512              | 41,308                        | -               | 41,308                       |
| <b>4650 Other Services and Supplies</b>    |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 116,647             | 4,433              | 121,080                       | -               | 121,080                      |
| <b>4700 Expendable Prop 250 - 5000</b>     |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 28,081              | 1,067              | 29,148                        | -               | 29,148                       |
| <b>4715 IT Expendable Property</b>         |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 157,006             | 5,966              | 162,972                       | -               | 162,972                      |
| <b>TOTAL SERVICES &amp; SUPPLIES</b>       |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 1,660,486           | 142,836            | 1,803,322                     | -               | 1,803,322                    |
| <b>TOTAL EXPENDITURES</b>                  |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 8,237,176           | 349,597            | 8,586,773                     | -               | 8,586,773                    |
| <b>ENDING BALANCE</b>                      |                     |                    |                               |                 |                              |
| 3400 Other Funds Ltd                       | 1,634,162           | (349,597)          | 1,284,565                     | -               | 1,284,565                    |
| <b>AUTHORIZED POSITIONS</b>                |                     |                    |                               |                 |                              |
| 8150 Class/Unclass Positions               | 29                  | -                  | 29                            | -               | 29                           |
| <b>AUTHORIZED FTE</b>                      |                     |                    |                               |                 |                              |
| 8250 Class/Unclass FTE Positions           | 29.00               | -                  | 29.00                         | -               | 29.00                        |



# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number 91900*

BDV004B

Version: V - 01 - Agency Request Budget

2019-21 Biennium

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

Real Estate Agency

| Description | Total Essential Packages | Pkg: 010<br>Non-PICS Part Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |  |
|-------------|--------------------------|---|--|--|--|--|
|-------------|--------------------------|---|--|--|--|--|

**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3160 Temporary Appointments**

|                      |     |     |   |  |  |  |
|----------------------|-----|-----|---|--|--|--|
| 3400 Other Funds Ltd | 568 | 568 | - |  |  |  |
|----------------------|-----|-----|---|--|--|--|

**3170 Overtime Payments**

|                      |     |     |   |  |  |  |
|----------------------|-----|-----|---|--|--|--|
| 3400 Other Funds Ltd | 105 | 105 | - |  |  |  |
|----------------------|-----|-----|---|--|--|--|

**3190 All Other Differential**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 58 | 58 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**SALARIES & WAGES**

|                      |     |     |   |  |  |  |
|----------------------|-----|-----|---|--|--|--|
| 3400 Other Funds Ltd | 731 | 731 | - |  |  |  |
|----------------------|-----|-----|---|--|--|--|

**TOTAL SALARIES & WAGES**

|  |              |              |   |  |  |  |
|--|--------------|--------------|---|--|--|--|
|  | <b>\$731</b> | <b>\$731</b> | - |  |  |  |
|--|--------------|--------------|---|--|--|--|

**OTHER PAYROLL EXPENSES**

**3220 Public Employees Retire Cont**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 28 | 28 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**3221 Pension Obligation Bond**

|                      |        |        |   |  |  |  |
|----------------------|--------|--------|---|--|--|--|
| 3400 Other Funds Ltd | 27,601 | 27,601 | - |  |  |  |
|----------------------|--------|--------|---|--|--|--|

**3230 Social Security Taxes**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 55 | 55 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**3240 Unemployment Assessments**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 15 | 15 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**3260 Mass Transit Tax**

|                      |       |       |   |  |  |  |
|----------------------|-------|-------|---|--|--|--|
| 3400 Other Funds Ltd | 3,542 | 3,542 | - |  |  |  |
|----------------------|-------|-------|---|--|--|--|

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Detail Revenues & Expenditures - Essential Packages

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BDV004B

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number 91900*

BDV004B  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description                            | Total Essential Packages | Pkg: 010<br>Non-PICS Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |
|--|--------------------------|---|--|--|--|
| <b>OTHER PAYROLL EXPENSES</b>          |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 31,241                   | 31,241  | -  |  |  |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>    | <b>\$31,241</b>          | <b>\$31,241</b>   | -  |  |  |
| <b>P.S. BUDGET ADJUSTMENTS</b>         |                          |   |  |  |  |
| <b>3455 Vacancy Savings</b>            |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 174,789                  | 174,789   | -  |  |  |
| <b>PERSONAL SERVICES</b>               |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 206,761                  | 206,761   | -  |  |  |
| <b>TOTAL PERSONAL SERVICES</b>         | <b>\$206,761</b>         | <b>\$206,761</b>  | -  |  |  |
| <b>SERVICES &amp; SUPPLIES</b>         |                          |   |  |  |  |
| <b>4100 Instate Travel</b>             |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 3,247                    | -   | 3,247  |  |  |
| <b>4125 Out of State Travel</b>        |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 369                      | -   | 369  |  |  |
| <b>4150 Employee Training</b>          |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 1,354                    | -   | 1,354  |  |  |
| <b>4175 Office Expenses</b>            |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 3,040                    | -   | 3,040  |  |  |
| <b>4200 Telecommunications</b>         |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 2,366                    | -   | 2,366  |  |  |
| <b>4225 State Gov. Service Charges</b> |                          |   |  |  |  |
| 3400 Other Funds Ltd                   | 45,238                   | -   | 45,238   |  |  |

# BUDGET NARRATIVE

**Real Estate Agency**

**Agency Number 91900**

BDV004B  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description                                  | Total Essential Packages | Pkg: 010<br>Non-PIC S Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |  |
|--|--------------------------|--|--|--|--|--|
| <b>4250 Data Processing</b>                  |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 4,001                    | -  | 4,001  |  |  |  |
| <b>4275 Publicity and Publications</b>       |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 1,344                    | -  | 1,344  |  |  |  |
| <b>4300 Professional Services</b>            |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 4,245                    | -  | 4,245  |  |  |  |
| <b>4315 IT Professional Services</b>         |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 3,266                    | -  | 3,266  |  |  |  |
| <b>4325 Attorney General</b>                 |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 51,267                   | -  | 51,267   |  |  |  |
| <b>4375 Employee Recruitment and Develop</b> |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 284                      | -  | 284  |  |  |  |
| <b>4400 Dues and Subscriptions</b>           |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 351                      | -  | 351  |  |  |  |
| <b>4425 Facilities Rental and Taxes</b>      |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 9,321                    | -  | 9,321  |  |  |  |
| <b>4475 Facilities Maintenance</b>           |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 165                      | -  | 165  |  |  |  |
| <b>4575 Agency Program Related S and S</b>   |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 1,512                    | -  | 1,512  |  |  |  |
| <b>4650 Other Services and Supplies</b>      |                          |  |  |  |  |  |
| 3400 Other Funds Ltd                         | 4,433                    | -  | 4,433  |  |  |  |
| <b>4700 Expendable Prop 250 - 5000</b>       |                          |  |  |  |  |  |

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Detail Revenues & Expenditures - Essential Packages  
BDV004B

# BUDGET NARRATIVE

Real Estate Agency

Agency Number 91900

BDV004B  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-000-00-00-00000

| Description                          | Total Essential Packages | Pkg: 010<br>Non-PICS Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |
|--------------------------------------|--------------------------|---|--|--|--|
| 3400 Other Funds Ltd                 | 1,067                    | -   | 1,067  |  |  |
| <b>4715 IT Expendable Property</b>   |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | 5,966                    | -   | 5,966  |  |  |
| <b>SERVICES &amp; SUPPLIES</b>       |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | 142,836                  | -   | 142,836  |  |  |
| <b>TOTAL SERVICES &amp; SUPPLIES</b> | <b>\$142,836</b>         | <b>-</b>  | <b>\$142,836</b>                                   |  |  |
| <b>EXPENDITURES</b>                  |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | 349,597                  | 206,761   | 142,836  |  |  |
| <b>TOTAL EXPENDITURES</b>            | <b>\$349,597</b>         | <b>\$206,761</b>  | <b>\$142,836</b>                                   |  |  |
| <b>ENDING BALANCE</b>                |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | (349,597)                | (206,761)   | (142,836)  |  |  |
| <b>TOTAL ENDING BALANCE</b>          | <b>(\$349,597)</b>       | <b>(\$206,761)</b>  | <b>(\$142,836)</b>                                 |  |  |

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number 91900*

BDV004B

Version: V - 01 - Agency Request Budget

2019-21 Biennium

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

Real Estate Agency

| Description | Total Essential Packages | Pkg: 010<br>Non-PICS Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |  |
|-------------|--------------------------|---|--|--|--|--|
|-------------|--------------------------|---|--|--|--|--|

**EXPENDITURES**

**PERSONAL SERVICES**

**SALARIES & WAGES**

**3160 Temporary Appointments**

|                      |     |     |   |  |  |  |
|----------------------|-----|-----|---|--|--|--|
| 3400 Other Funds Ltd | 568 | 568 | - |  |  |  |
|----------------------|-----|-----|---|--|--|--|

**3170 Overtime Payments**

|                      |     |     |   |  |  |  |
|----------------------|-----|-----|---|--|--|--|
| 3400 Other Funds Ltd | 105 | 105 | - |  |  |  |
|----------------------|-----|-----|---|--|--|--|

**3190 All Other Differential**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 58 | 58 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**SALARIES & WAGES**

|                      |     |     |   |  |  |  |
|----------------------|-----|-----|---|--|--|--|
| 3400 Other Funds Ltd | 731 | 731 | - |  |  |  |
|----------------------|-----|-----|---|--|--|--|

|                                   |              |              |   |  |  |  |
|-----------------------------------|--------------|--------------|---|--|--|--|
| <b>TOTAL SALARIES &amp; WAGES</b> | <b>\$731</b> | <b>\$731</b> | - |  |  |  |
|-----------------------------------|--------------|--------------|---|--|--|--|

**OTHER PAYROLL EXPENSES**

**3220 Public Employees Retire Cont**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 28 | 28 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**3221 Pension Obligation Bond**

|                      |        |        |   |  |  |  |
|----------------------|--------|--------|---|--|--|--|
| 3400 Other Funds Ltd | 27,601 | 27,601 | - |  |  |  |
|----------------------|--------|--------|---|--|--|--|

**3230 Social Security Taxes**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 55 | 55 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**3240 Unemployment Assessments**

|                      |    |    |   |  |  |  |
|----------------------|----|----|---|--|--|--|
| 3400 Other Funds Ltd | 15 | 15 | - |  |  |  |
|----------------------|----|----|---|--|--|--|

**3260 Mass Transit Tax**

|                      |       |       |   |  |  |  |
|----------------------|-------|-------|---|--|--|--|
| 3400 Other Funds Ltd | 3,542 | 3,542 | - |  |  |  |
|----------------------|-------|-------|---|--|--|--|

07/13/18

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Detail Revenues & Expenditures - Essential Packages

2:40 PM

BDV004B

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number 91900*

BDV004B  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                            | Total Essential Packages | Pkg: 010<br>Non-PICS Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |  |
|--|--------------------------|---|--|--|--|--|
| <b>OTHER PAYROLL EXPENSES</b>          |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 31,241                   | 31,241  | -  |  |  |  |
| <b>TOTAL OTHER PAYROLL EXPENSES</b>    | <b>\$31,241</b>          | <b>\$31,241</b>   | -  |  |  |  |
| <b>P.S. BUDGET ADJUSTMENTS</b>         |                          |   |  |  |  |  |
| <b>3455 Vacancy Savings</b>            |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 174,789                  | 174,789   | -  |  |  |  |
| <b>PERSONAL SERVICES</b>               |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 206,761                  | 206,761   | -  |  |  |  |
| <b>TOTAL PERSONAL SERVICES</b>         | <b>\$206,761</b>         | <b>\$206,761</b>  | -  |  |  |  |
| <b>SERVICES &amp; SUPPLIES</b>         |                          |   |  |  |  |  |
| <b>4100 Instate Travel</b>             |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 3,247                    | -   | 3,247  |  |  |  |
| <b>4125 Out of State Travel</b>        |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 369                      | -   | 369  |  |  |  |
| <b>4150 Employee Training</b>          |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 1,354                    | -   | 1,354  |  |  |  |
| <b>4175 Office Expenses</b>            |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 3,040                    | -   | 3,040  |  |  |  |
| <b>4200 Telecommunications</b>         |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 2,366                    | -   | 2,366  |  |  |  |
| <b>4225 State Gov. Service Charges</b> |                          |   |  |  |  |  |
| 3400 Other Funds Ltd                   | 45,238                   | -   | 45,238   |  |  |  |

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Detail Revenues & Expenditures - Essential Packages  
BDV004B

# BUDGET NARRATIVE

*Real Estate Agency*

*Agency Number 91900*

BDV004B  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                                  | Total Essential Packages | Pkg: 010<br>Non-PICS Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |
|--|--------------------------|---|--|--|--|
| <b>4250 Data Processing</b>                  |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 4,001                    | -   | 4,001  |  |  |
| <b>4275 Publicity and Publications</b>       |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 1,344                    | -   | 1,344  |  |  |
| <b>4300 Professional Services</b>            |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 4,245                    | -   | 4,245  |  |  |
| <b>4315 IT Professional Services</b>         |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 3,266                    | -   | 3,266  |  |  |
| <b>4325 Attorney General</b>                 |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 51,267                   | -   | 51,267   |  |  |
| <b>4375 Employee Recruitment and Develop</b> |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 284                      | -   | 284  |  |  |
| <b>4400 Dues and Subscriptions</b>           |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 351                      | -   | 351  |  |  |
| <b>4425 Facilities Rental and Taxes</b>      |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 9,321                    | -   | 9,321  |  |  |
| <b>4475 Facilities Maintenance</b>           |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 165                      | -   | 165  |  |  |
| <b>4575 Agency Program Related S and S</b>   |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 1,512                    | -   | 1,512  |  |  |
| <b>4650 Other Services and Supplies</b>      |                          |   |  |  |  |
| 3400 Other Funds Ltd                         | 4,433                    | -   | 4,433  |  |  |
| <b>4700 Expendable Prop 250 - 5000</b>       |                          |   |  |  |  |

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Detail Revenues & Expenditures - Essential Packages  
BDV004B

# BUDGET NARRATIVE

Real Estate Agency

Agency Number 91900

BDV004B  
2019-21 Biennium  
Real Estate Agency

Version: V - 01 - Agency Request Budget  
Cross Reference Number: 91900-050-00-00-00000

| Description                          | Total Essential Packages | Pkg: 010<br>Non-PICS Penl Svc /<br>Vacancy Factor<br><br>Priority: 00 | Pkg: 031<br>Standard Inflation<br><br>Priority: 00 |  |  |
|--------------------------------------|--------------------------|---|--|--|--|
| 3400 Other Funds Ltd                 | 1,067                    | -   | 1,067  |  |  |
| <b>4715 IT Expendable Property</b>   |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | 5,966                    | -   | 5,966  |  |  |
| <b>SERVICES &amp; SUPPLIES</b>       |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | 142,836                  | -   | 142,836  |  |  |
| <b>TOTAL SERVICES &amp; SUPPLIES</b> | <b>\$142,836</b>         | <b>-</b>  | <b>\$142,836</b>                                   |  |  |
| <b>EXPENDITURES</b>                  |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | 349,597                  | 206,761   | 142,836  |  |  |
| <b>TOTAL EXPENDITURES</b>            | <b>\$349,597</b>         | <b>\$206,761</b>  | <b>\$142,836</b>                                   |  |  |
| <b>ENDING BALANCE</b>                |                          |   |  |  |  |
| 3400 Other Funds Ltd                 | (349,597)                | (206,761)   | (142,836)  |  |  |
| <b>TOTAL ENDING BALANCE</b>          | <b>(\$349,597)</b>       | <b>(\$206,761)</b>  | <b>(\$142,836)</b>                                 |  |  |



# BUDGET NARRATIVE

01/22/19 REPORT NO.: DPDPPLBUDCL  
 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF  
 AGENCY:91900 REAL ESTATE AGENCY  
 SUMMARY XREF:050-00-00 000 Real Estate Agency

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

PAGE  
 PROD FILE  
 2019-21  
 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    | C0107 | AD ADMINISTRATIVE SPECIALIST 1    | 1          | 1.00  | 24.00  | 3,262.00        |           | 78,288    |           |           | 78,288    |
| 000 | AR    | C0108 | AD ADMINISTRATIVE SPECIALIST 2    | 4          | 4.00  | 96.00  | 4,433.75        |           | 425,640   |           |           | 425,640   |
| 000 | AR    | C0860 | AD PROGRAM ANALYST 1              | 1          | 1.00  | 24.00  | 4,509.00        |           | 108,216   |           |           | 108,216   |
| 000 | AR    | C0865 | AD PUBLIC AFFAIRS SPECIALIST 2    | 1          | 1.00  | 24.00  | 7,242.00        |           | 173,808   |           |           | 173,808   |
| 000 | AR    | C1216 | AD ACCOUNTANT 2                   | 1          | 1.00  | 24.00  | 5,437.00        |           | 130,488   |           |           | 130,488   |
| 000 | AR    | C1486 | ID INFO SYSTEMS SPECIALIST 6      | 1          | 1.00  | 24.00  | 7,376.00        |           | 177,024   |           |           | 177,024   |
| 000 | AR    | C5235 | AD FINANCIAL INVESTIGATOR 1       | 7          | 7.00  | 168.00 | 6,112.42        |           | 1,026,888 |           |           | 1,026,888 |
| 000 | AR    | C5246 | AD COMPLIANCE SPECIALIST 1        | 3          | 3.00  | 72.00  | 4,873.33        |           | 350,880   |           |           | 350,880   |
| 000 | AR    | C5247 | AD COMPLIANCE SPECIALIST 2        | 1          | 1.00  | 24.00  | 5,188.00        |           | 124,512   |           |           | 124,512   |
| 000 | AR    | C5248 | AD COMPLIANCE SPECIALIST 3        | 2          | 2.00  | 48.00  | 7,242.00        |           | 347,616   |           |           | 347,616   |
| 000 | B     | Y7500 | AE BOARD AND COMMISSION MEMBER    |            | .00   | .00    | 0.00            |           | 6,480     |           |           | 6,480     |
| 000 | MEAHZ | 7012  | HD PRINCIPAL EXECUTIVE/MANAGER G  | 1          | 1.00  | 24.00  | 12,467.00       |           | 299,208   |           |           | 299,208   |
| 000 | MENNZ | 0119  | AD EXECUTIVE SUPPORT SPECIALIST 2 | 1          | 1.00  | 24.00  | 4,666.00        |           | 111,984   |           |           | 111,984   |
| 000 | MESNZ | 7010  | AD PRINCIPAL EXECUTIVE/MANAGER F  | 1          | 1.00  | 24.00  | 10,121.00       |           | 242,904   |           |           | 242,904   |
| 000 | MMN   | X0863 | AD PROGRAM ANALYST 4              | 1          | 1.00  | 24.00  | 8,332.00        |           | 199,968   |           |           | 199,968   |
| 000 | MMS   | X7002 | AD PRINCIPAL EXECUTIVE/MANAGER B  | 1          | 1.00  | 24.00  | 6,542.00        |           | 157,008   |           |           | 157,008   |
| 000 | MMS   | X7008 | AD PRINCIPAL EXECUTIVE/MANAGER E  | 2          | 2.00  | 48.00  | 9,177.00        |           | 440,496   |           |           | 440,496   |
| 000 |       |       |                                   | 29         | 29.00 | 696.00 | 4,819.00        |           | 4,401,408 |           |           | 4,401,408 |

# BUDGET NARRATIVE

01/22/19 REPORT NO.: PPDPLBUDCL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE  
 REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF 2019-21 PROD FILE  
 AGENCY: 91900 REAL ESTATE AGENCY PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF: 050-00-00 101 Real Estate Agency

| 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 |
|-----|-------|-------|--------------------------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
| 101 | AR    | C0108 | AD ADMINISTRATIVE SPECIALIST 2 | 1-         | 1.00- | 24.00- | 4,724.00        |           | 113,376-  |           |           | 113,376-  |
| 101 | AR    | C5246 | AD COMPLIANCE SPECIALIST 1     | 1          | 1.00  | 24.00  | 4,724.00        |           | 113,376   |           |           | 113,376   |
| 101 |       |       |                                |            | .00   | .00    | 4,724.00        |           |           |           |           |           |
|     |       |       |                                | 29         | 29.00 | 696.00 | 4,814.25        |           | 4,401,408 |           |           | 4,401,408 |
|     |       |       |                                | 29         | 29.00 | 696.00 | 4,814.25        |           | 4,401,408 |           |           | 4,401,408 |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |
|     |       |       |                                |            |       |        |                 |           |           |           |           |           |

# BUDGET NARRATIVE

01/22/19 REPORT NO.: PPDPFLBUDCL DEPT. OF ADMIN. SVCS. -- DPDB PICS SYSTEM PAGE  
REPORT: SUMMARY LIST BY PKG BY SUMMARY XREF 2019-21 PROD FILE  
AGENCY: 91900 REAL ESTATE AGENCY PICS SYSTEM: BUDGET PREPARATION  
SUMMARY XREF: 050-00-00 101 Real Estate Agency

| PKG | CLASS | COMP | DESCRIPTION | POS<br>CNT | FTE   | MOE    | AVERAGE<br>RATE | GF<br>SAL | OF<br>SAL | PF<br>SAL | LF<br>SAL | AF<br>SAL |
|-----|-------|------|-------------|------------|-------|--------|-----------------|-----------|-----------|-----------|-----------|-----------|
|     |       |      |             | 29         | 29.00 | 696.00 | 4,814.25        |           | 4,401,408 |           |           | 4,401,408 |

# BUDGET NARRATIVE

01/22/19 REPORT NO.: PFDPLAGYCL  
 REPORT: SUMMARY LIST BY PKG BY AGENCY  
 AGENCY:91900 REAL ESTATE AGENCY

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

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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        | C0107 | AP ADMINISTRATIVE SPECIALIST 1 | 1          | 1.00  | 24.00  | 3,262.00        |           | 78,288    |           |           | 78,288    |
| 000 | AR        | C0108 | AP ADMINISTRATIVE SPECIALIST 2 | 3          | 3.00  | 72.00  | 4,491.80        |           | 312,264   |           |           | 312,264   |
| 000 | AR        | C0860 | AP PROGRAM ANALYST 1           | 1          | 1.00  | 24.00  | 4,509.00        |           | 108,216   |           |           | 108,216   |
| 000 | AR        | C0865 | AP PUBLIC AFFAIRS SPECIALIST 2 | 1          | 1.00  | 24.00  | 7,242.00        |           | 173,808   |           |           | 173,808   |
| 000 | AR        | C1216 | AP ACCOUNTANT 2                | 1          | 1.00  | 24.00  | 5,437.00        |           | 130,488   |           |           | 130,488   |
| 000 | AR        | C1486 | IP INFO SYSTEMS SPECIALIST 6   | 1          | 1.00  | 24.00  | 7,376.00        |           | 177,024   |           |           | 177,024   |
| 000 | AR        | C5235 | AP FINANCIAL INVESTIGATOR 1    | 7          | 7.00  | 168.00 | 6,112.42        |           | 1,026,888 |           |           | 1,026,888 |
| 000 | AR        | C5246 | AP COMPLIANCE SPECIALIST 1     | 4          | 4.00  | 96.00  | 4,836.00        |           | 464,256   |           |           | 464,256   |
| 000 | AR        | C5247 | AP COMPLIANCE SPECIALIST 2     | 1          | 1.00  | 24.00  | 5,188.00        |           | 124,512   |           |           | 124,512   |
| 000 | AR        | C5248 | AP COMPLIANCE SPECIALIST 3     | 2          | 2.00  | 48.00  | 7,242.00        |           | 347,616   |           |           | 347,616   |
| 000 | B         | Y7500 | AR BOARD AND COMMISSION MEMBER |            | .00   | .00    | 0.00            |           | 6,480     |           |           | 6,480     |
| 000 | MEAHZ7012 | HP    | PRINCIPAL EXECUTIVE/MANAGER G  | 1          | 1.00  | 24.00  | 12,467.00       |           | 299,208   |           |           | 299,208   |
| 000 | MENNZ0119 | AP    | EXECUTIVE SUPPORT SPECIALIST 2 | 1          | 1.00  | 24.00  | 4,666.00        |           | 111,984   |           |           | 111,984   |
| 000 | MESNZ7010 | AP    | PRINCIPAL EXECUTIVE/MANAGER F  | 1          | 1.00  | 24.00  | 10,121.00       |           | 242,904   |           |           | 242,904   |
| 000 | MMN X0863 | AP    | PROGRAM ANALYST 4              | 1          | 1.00  | 24.00  | 8,332.00        |           | 199,968   |           |           | 199,968   |
| 000 | MMS X7002 | AP    | PRINCIPAL EXECUTIVE/MANAGER B  | 1          | 1.00  | 24.00  | 6,542.00        |           | 157,008   |           |           | 157,008   |
| 000 | MMS X7008 | AP    | PRINCIPAL EXECUTIVE/MANAGER E  | 2          | 2.00  | 48.00  | 9,177.00        |           | 440,496   |           |           | 440,496   |
|     |           |       |                                | 29         | 29.00 | 696.00 | 4,814.25        |           | 4,401,408 |           |           | 4,401,408 |



# BUDGET NARRATIVE

01/22/19 REPORT NO.: PFDPLMSBUD  
 REPORT: DETAIL LISTING BY SUMMARY XREF AGENCY  
 AGENCY: 91900 REAL ESTATE AGENCY  
 SUMMARY XREF: 050-00-00 101 Real Estate Agency

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

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 2019-21  
 PROD FILE  
 PICS SYSTEM: BUDGET PREPARATION

| POSITION<br>NUMBER                        | AUTH NO   | ORG STRUC       | F POS<br>PKG Y TYP | CLASS COMP  | S<br>T POS<br>RNG P CNT |    | FTE | BUDGET<br>RATE | MOS      | GF<br>SAL | OP<br>SAL | FF<br>SAL | LF<br>SAL | T<br>R<br>K |
|---|-----------|-----------------|--------------------|-------------|-------------------------|----|-----|----------------|----------|-----------|-----------|-----------|-----------|-------------|
| 0005025                                   | 000512550 | 050-01-00-00000 | 101 0 PF           | AR C0108 AP | 20                      | 09 | 1-  | 1.00-          | 4,724.00 | 24.00-    |           | 113,376-  |           |             |
| EST DATE: 2019/07/01 EXP DATE: 9999/01/01 |           |                 |                    |             |                         |    |     |                |          |           |           |           |           |             |
| 0005025                                   | 000512550 | 050-01-00-00000 | 101 0 PF           | AR C5246 AP | 21                      | 08 | 1   | 1.00           | 4,724.00 | 24.00     |           | 113,376   |           |             |
| EST DATE: 2019/07/01 EXP DATE: 9999/01/01 |           |                 |                    |             |                         |    |     |                |          |           |           |           |           |             |
|   |           |                 | 101                |             |                         |    |     | .00            |          | .00       |           |           |           |             |
|   |           |                 |                    |             |                         |    |     | .00            |          | .00       |           |           |           |             |
|   |           |                 |                    |             |                         |    |     | .00            |          | .00       |           |           |           |             |

# BUDGET NARRATIVE

01/22/19 REPORT NO.: PPDPLWSBUD  
REPORT: DETAIL LISTING BY SUMMARY XREF AGENCY  
AGENCY: 91900 REAL ESTATE AGENCY  
SUMMARY XREF: 050-00-00 101 Real Estate Agency

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

PAGE  
2019-21  
PROD FILE  
PICS SYSTEM: BUDGET PREPARATION

| POSITION<br>NUMBER | AUTH NO | ORG STRUC | F POS<br>PKG Y TYP | CLASS COMP | S<br>T POS<br>RNG P CNT | FTE | BUDGET<br>RATE | MOS | GF<br>SAL | OP<br>SAL | FF<br>SAL | LF<br>SAL | T<br>R<br>K |
|--------------------|---------|-----------|--------------------|------------|-------------------------|-----|----------------|-----|-----------|-----------|-----------|-----------|-------------|
|                    |         |           |                    |            |                         | .00 |                | .00 |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |
|                    |         |           |                    |            |                         |     |                |     |           |           |           |           |             |

# BUDGET NARRATIVE

01/22/19 REPORT NO.: FPDFFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE :  
 REPORT: PACKAGE FISCAL IMPACT REPORT 2019-21 PROD FILE  
 AGENCY: 91900 REAL ESTATE AGENCY PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF: 050-00-00 Real Estate Agency PACKAGE: 101 - Compliance Specialist Reclasi

| POSITION NUMBER | CLASS COMP | CLASS NAME                     | POS CNT | FTE  | MOS   | STEP | RATE     | GF SAL/OPE | OF SAL/OPE | PF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|-----------------|------------|--------------------------------|---------|------|-------|------|----------|------------|------------|------------|------------|------------|
| 0005025         | AR C0108   | AP ADMINISTRATIVE SPECIALIST 2 | 1       | 1.00 | 24.00 | 09   | 4,724.00 |            | 113,376    |            |            | 113,376    |
|                 |            |                                |         |      |       |      |          |            | 63,216     |            |            | 63,216     |
| 0005025         | AR C5246   | AP COMPLIANCE SPECIALIST 1     | 1       | 1.00 | 24.00 | 08   | 4,724.00 |            | 113,376    |            |            | 113,376    |
|                 |            |                                |         |      |       |      |          |            | 63,216     |            |            | 63,216     |

TOTAL PICS SALARY  
 TOTAL PICS OPE

TOTAL PICS PERSONAL SERVICES =

---      -----      -----  
 .00      .00



# BUDGET NARRATIVE

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## Real Estate Agency

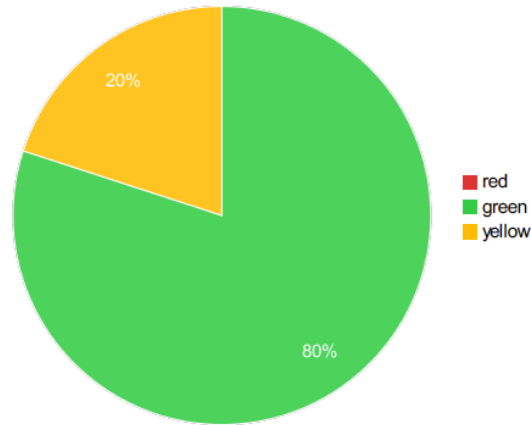
Annual Performance Progress Report

Reporting Year 2018

Published: 10/1/2018 12:10:18 PM

# BUDGET NARRATIVE

| KPM # | 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. |

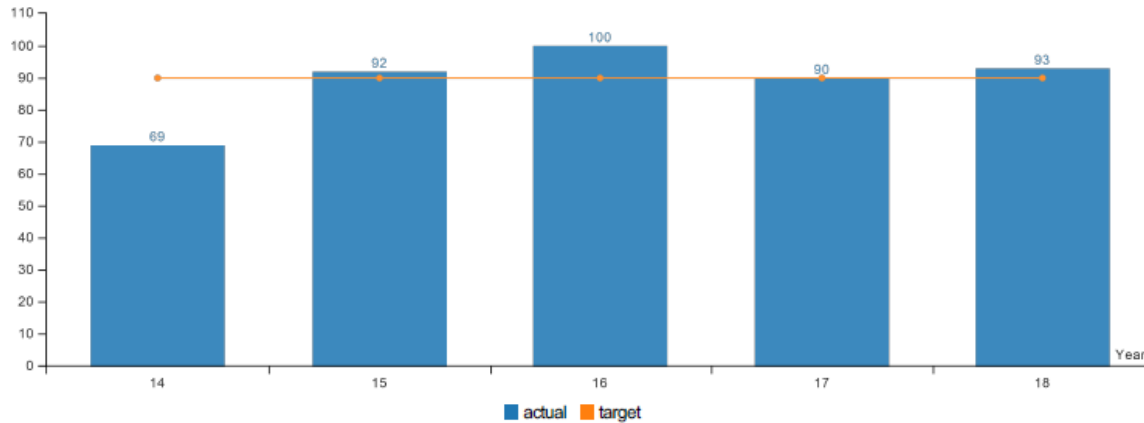


| Performance Summary | Green           | Yellow               | Red             |
|---------------------|-----------------|----------------------|-----------------|
|                     | = Target to -5% | = Target -5% to -15% | = Target > -15% |
| Summary Stats:      | 80%             | 20%                  | 0%              |

# BUDGET NARRATIVE

|        |   |
|--------|---|
| KPM #1 | Compliance Rate Achieved - Percent of property managers/principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review. |
|        | Data Collection Period: Jul 01 - Jun 30   |

\* Upward Trend = positive result



| Report Year                     | 2014 | 2015 | 2016 | 2017 | 2018 |
|---------------------------------|------|------|------|------|------|
| <b>Compliance Rate Achieved</b> |      |      |      |      |      |
| Actual                          | 69%  | 92%  | 100% | 90%  | 93%  |
| Target                          | 90%  | 90%  | 90%  | 90%  | 90%  |

### How Are We Doing

For the 2018 reporting period 93% 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.

### Factors Affecting Results

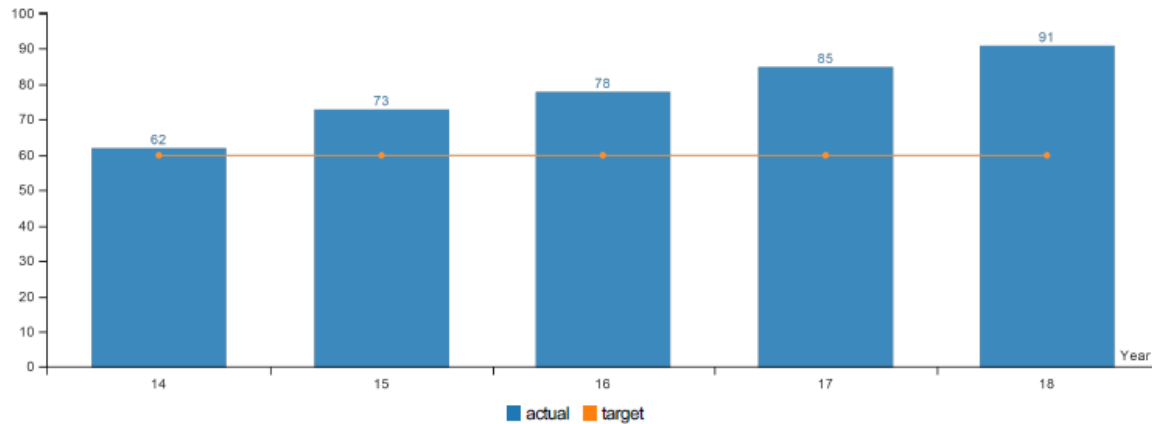
This key performance measure was implemented in reporting period 2014. In the initial cycle, results were far below the 90% target, at 69%. The low compliance rate reported at that time was due to a lack of clarity in the communication with participants regarding the time commitment, required follow up and 45 day resultant evaluation. Licensees that participated in the initial review were often not available in a timely manner to reassess compliance and an assumption of noncompliance was factored into those results. In addition, the Agency observed that some compliance issues detected were transaction oriented and could not be reproduced in the given period. Therefore being impossible to achieve compliance.

In response, the Agency modified the administration of the compliance review in 2015 to both clarify the process for participants and eliminate questions that could be not corrected if found noncompliant.

# BUDGET NARRATIVE

|        |  |
|--------|--|
| KPM #2 | Percent of investigations completed within 150 days of receipt of complaint. - |
|        | Data Collection Period: Jul 01 - Jun 30  |

\* Upward Trend = positive result



| Report Year  | 2014 | 2015 | 2016 | 2017 | 2018 |
|--|------|------|------|------|------|
| <b>Percent of cases investigated within 150 days of receipt of complaint</b> |      |      |      |      |      |
| Actual   | 62%  | 73%  | 78%  | 85%  | 91%  |
| Target   | 60%  | 60%  | 60%  | 60%  | 60%  |

### How Are We Doing

For the 2018 reporting period 91% of cases were completed within 150 days of receipt of the complaint, well exceeding the 60% target. The Agency has continued to steadily improve upon this benchmark, year over year, in each of the previous four reporting periods that this key performance measure has been in place.

### Factors Affecting Results

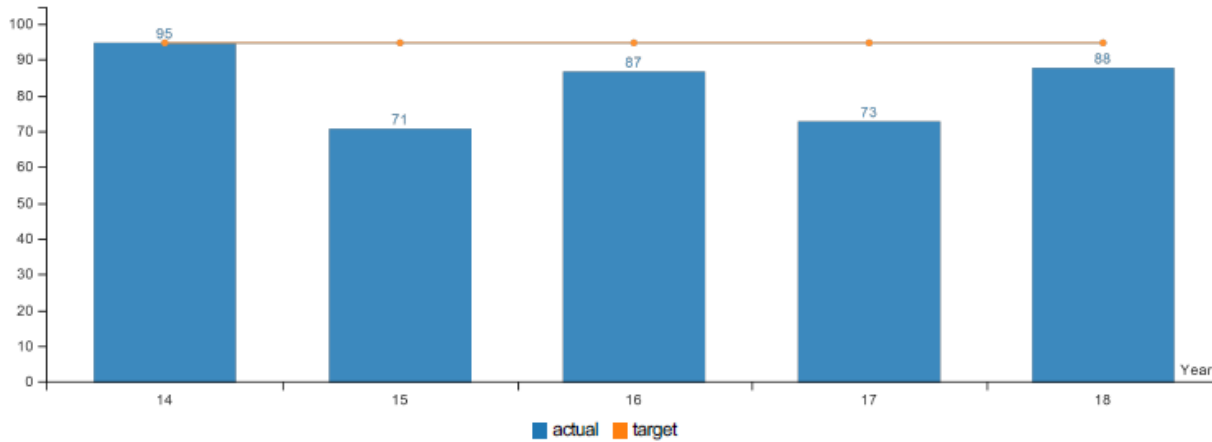
In August of 2017, at the beginning of the current reporting period, the Agency shifted one position (1 FTE) from the Administrative Services to the Regulations division. This additional resource in Regulations allowed the Agency to improve upon and expedite the complaint and investigation process by instituting the role of a Compliance Coordinator. This position facilitates, leads and provides direction throughout the investigation as well as conducts a preliminary review of cases prior to management review. This triaging effort has ensured quality while accelerating the overall case management process.

Further, the Agency has experienced limited vacancy in the Regulations division and has recruited new employees with extensive experience and education in investigative best practices and financial accounting. The retention of experienced investigators has been a key component in the Agency's ability to continue to meet this measure.

# BUDGET NARRATIVE

|        |   |
|--------|---|
| 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. |
|        | Data Collection Period: Jul 01 - Jun 30   |

\* Upward Trend = positive result



| Report Year   | 2014 | 2015 | 2016 | 2017 | 2018 |
|---|------|------|------|------|------|
| <b>Percent of Contested Case Actions Resolved Before a Formal Hearing</b> |      |      |      |      |      |
| Actual  | 95%  | 71%  | 87%  | 73%  | 88%  |
| Target  | 95%  | 95%  | 95%  | 95%  | 95%  |

**How Are We Doing**

In FY 2018 the Agency increased the rate of settlement of contested case actions to 88%, from 73% in FY 2017 though still falling short of the 95% target.

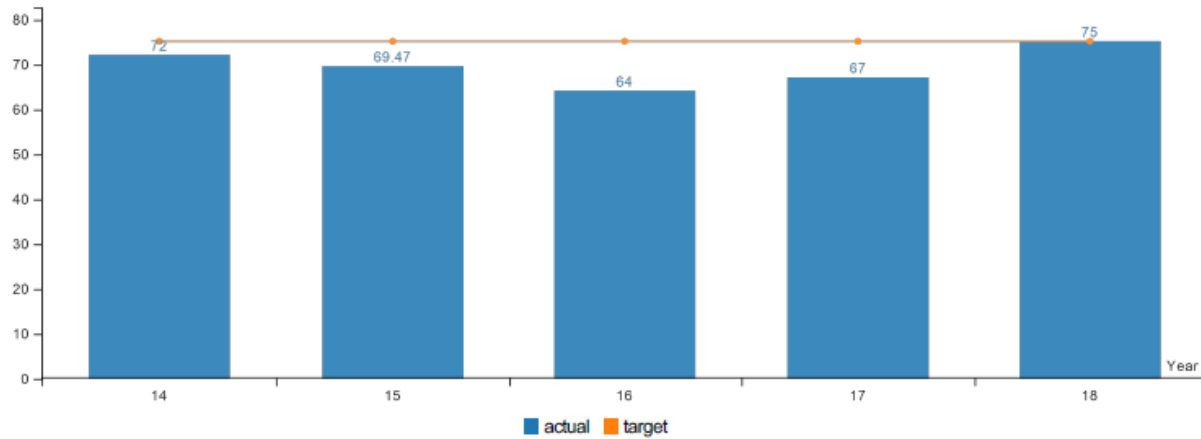
**Factors Affecting Results**

The settlement process is an important in resolving disciplinary actions. This step provides the respondent with the opportunity to meet with the Regulations Manager after the completion of each investigation. This allows all parties to better understand each other, thus improving the number of cases settled without an administrative hearing. However, some respondents decline a settlement agreement because they prefer to present their position in a formal administrative hearing.

# BUDGET NARRATIVE

|        |  |
|--------|--|
| KPM #4 | Percent of licensees who rate the board-administered exam as "good" or "excellent" as an effective screen for competent and ethical professionals. - |
|        | Data Collection Period: Jul 01 - Jun 30  |

\* Upward Trend = positive result



| Report Year   | 2014 | 2015   | 2016 | 2017 | 2018 |
|---|------|--------|------|------|------|
| <b>Percent of property managers/principal brokers who rate the board-administered exam as "good" or "excellent" as an effective screen for competent and ethical professionals.</b> |      |        |      |      |      |
| Actual  | 72%  | 69.47% | 64%  | 67%  | 75%  |
| Target  | 75%  | 75%    | 75%  | 75%  | 75%  |

### How Are We Doing

In FY 2018 the Agency met the target of 75% for the first period since the implementation of the measure in 2014.

### Factors Affecting Results

In the 2017 Legislative Session the Agency proposed a minor change in the collection method of this measure by changing the timing with which the data is collected. Since the enactment of this measure, from collection periods FY 2014 through FY 2017, the Agency has sent a survey to licensees six months after initial licensure. This survey requests feedback on the examination generally and includes this measure which seeks a rating on the examination as an effective screen for competent and ethical professionals. Over time the Agency observed that comments associated with the rating were heavily focused on performance and daily practices in real estate business, such as lead generation and creating effective marketing campaigns, which are not a focus of real estate education nor the examination.

With the approval of the Legislature, in FY 2018, the Agency began sending the survey to licensees within one month of obtaining their license. The change in the timing between the exam and response to the survey has increased the performance of this measure from 64% at its low to 75%, in the most recent reporting period. New licensees are now reacting to the question more precisely with recent reflection on the examination process.

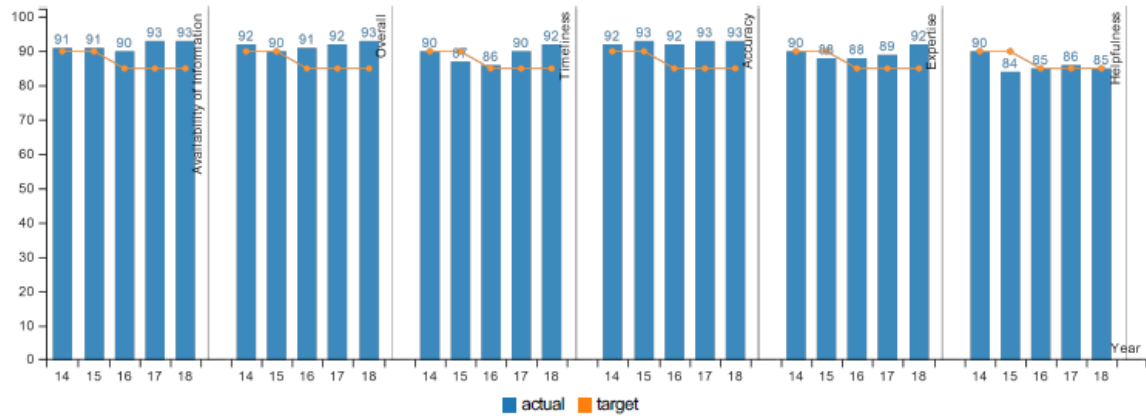
# BUDGET NARRATIVE

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# BUDGET NARRATIVE

KPM #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.

Data Collection Period: Jul 01 - Jun 30



| Report Year                        | 2014 | 2015 | 2016 | 2017 | 2018 |
|------------------------------------|------|------|------|------|------|
| <b>Availability of Information</b> |      |      |      |      |      |
| Actual                             | 91%  | 91%  | 90%  | 93%  | 93%  |
| Target                             | 90%  | 90%  | 85%  | 85%  | 85%  |
| <b>Overall</b>                     |      |      |      |      |      |
| Actual                             | 92%  | 90%  | 91%  | 92%  | 93%  |
| Target                             | 90%  | 90%  | 85%  | 85%  | 85%  |
| <b>Timeliness</b>                  |      |      |      |      |      |
| Actual                             | 90%  | 87%  | 86%  | 90%  | 92%  |
| Target                             | 90%  | 90%  | 85%  | 85%  | 85%  |
| <b>Accuracy</b>                    |      |      |      |      |      |
| Actual                             | 92%  | 93%  | 92%  | 93%  | 93%  |
| Target                             | 90%  | 90%  | 85%  | 85%  | 85%  |
| <b>Expertise</b>                   |      |      |      |      |      |
| Actual                             | 90%  | 88%  | 88%  | 89%  | 92%  |
| Target                             | 90%  | 90%  | 85%  | 85%  | 85%  |
| <b>Helpfulness</b>                 |      |      |      |      |      |
| Actual                             | 90%  | 84%  | 85%  | 86%  | 85%  |
| Target                             | 90%  | 90%  | 85%  | 85%  | 85%  |

How Are We Doing



# BUDGET NARRATIVE

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The Agency meets or exceeds all customer service targets.

## **Factors Affecting Results**

The Agency strives to provide "live-answer" phone support and "real-time" email response during business hours. The Agency transitioned to the statewide IBM telephone system in June 2016. Prior to that time the Agency had a receptionist which answered all calls live and transferred to available staff. With this transition the Agency felt it was very important for customers to continue to receive excellent customer service with minimal hold times. The system now allows the Agency to more closely monitor staff availability for phone service and review reporting on call volume, length and response data. These tools have allowed the Agency to improve the overall Customer Service rating by 3% since implementing the new system and by 13% 5 years ago. Average hold times are currently under 15 seconds and feedback continues to be very positive.