

LEGISLATIVE ADOPTED BUDGET



2023-2025

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CERTIFICATION

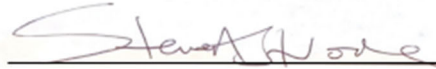
I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

Oregon Real Estate Agency

AGENCY NAME

530 Center St NE, Suite 100
Salem, OR 97301

AGENCY ADDRESS



SIGNATURE

Oregon Real Estate Commissioner

TITLE



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

Agency Request |

Governor's Budget

Legislatively Adopted

LEGISLATIVE ACTION

82nd Oregon Legislative Assembly – 2023 Regular Session

SB 5536 A BUDGET REPORT and MEASURE SUMMARY

Carrier: Rep. Mannix

Joint Committee On Ways and Means

Action Date: 05/05/23

Action: Do Pass the A-Eng bill.

House Vote

Yeas: 11 - Breese-Iverson, Cate, Evans, Gomberg, Holvey, Lewis, McLain, Pham K, Sanchez, Smith G, Valderrama

Nays: 1 - Reschke

Senate Vote

Yeas: 9 - Anderson, Campos, Dembrow, Findley, Frederick, Gelser Blouin, Girod, Sollman, Steiner

Exc: 2 - Hansell, Knopp

Prepared By: Alicia Michelson, Department of Administrative Services

Reviewed By: Tim Walker, Legislative Fiscal Office

Real Estate Agency
2023-25

This summary has not been adopted or officially endorsed by action of the committee.

SB 5536 A

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Budget Summary*

	2021-23 Legislatively Approved Budget ⁽¹⁾	2023-25 Current Service Level	2023-25 Committee Recommendation	Committee Change from 2021-23 Leg. Approved	
				\$ Change	% Change
Other Funds Limited	\$ 10,141,433	\$ 11,027,459	\$ 14,103,674	\$ 3,962,241	39.1%
Total	\$ 10,141,433	\$ 11,027,459	\$ 14,103,674	\$ 3,962,241	39.1%

Position Summary

Authorized Positions	30	29	34	4
Full-time Equivalent (FTE) positions	29.75	29.00	34.00	4.25

⁽¹⁾ Includes adjustments through January 2023

* Excludes Capital Construction expenditures

Summary of Revenue Changes

The Oregon Real Estate Agency (OREA) is supported solely by Other Funds revenues. Application fees and fees paid for professional licenses by brokers, principal brokers, and property managers account for approximately 97 percent of all revenue collected. The remaining revenue is derived from charges for services and fines and forfeitures, with all civil penalties transferred to the General Fund. With the adoption of the subcommittee recommendations, OREA's estimated 2023-25 ending fund balance is approximately six months of operating expenses.

Summary of Transportation and Economic Development Subcommittee Action

The mission of OREA is 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 is responsible for the licensing, continuing education, and enforcement of Oregon's real estate laws applicable to brokers, property managers, and real estate firms.

The subcommittee recommended a budget of \$14,103,674 Other Funds expenditure limitation and 34 positions (34.00 FTE) for the 2023-25 biennium, which represents a 39.1 percent increase from the 2021-23 Legislatively Approved Budget. The subcommittee recommended the following packages:

- **Package 101: eLicense Replacement System.** This package increases Other Funds expenditure limitation by \$2,307,803 to replace the agency's business suite software, eLicense, and continues one limited duration Project Manager position (1.00 FTE) to assist with software implementation and deployment.

SB 5536 A

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- Package 102: Compliance & Audits Division Staffing. This package increases Other Funds expenditure limitation by \$529,146 to establish three permanent positions (3.00 FTE) to meet the public demand and consumer protection need for increased oversight of licensed property management activities. The positions include one auditor and two compliance specialists.
 - Package 103: HR/DEI/Communications Staffing. This package increases Other Funds expenditure limitation by \$239,266 to establish one permanent Human Resource Analyst 3 (1.00 FTE). This position will assist the agency by providing human resources and recruitment support and act as the agency's Affirmative Action and Diversity, Equity, and Inclusion Coordinator to improve the diversity of licensed real estate brokers.

Summary of Performance Measure Action

See attached Legislatively Adopted 2023-25 Key Performance Measures form.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

Oregon Real Estate Agency
Alicia Michelson - (971)-209-9217

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS		FEDERAL FUNDS		TOTAL ALL FUNDS	POS	FTE
			LIMITED	NONLIMITED	LIMITED	NONLIMITED			
2021-23 Legislatively Approved Budget at Jan 2023 *	\$ -	\$ -	\$ 10,141,433	\$ -	\$ -	\$ -	\$ 10,141,433	30	29.75
2023-25 Current Service Level (CSL)*	\$ -	\$ -	\$ 11,027,459	\$ -	\$ -	\$ -	\$ 11,027,459	29	29.00
<u>SUBCOMMITTEE ADJUSTMENTS (from CSL)</u>									
SCR 91900-050 Real Estate Agency									
Package 101: eLicense Replacement System									
Personal Services	\$ -	\$ -	\$ 307,803	\$ -	\$ -	\$ -	\$ 307,803	1	1.00
Capital Outlay	\$ -	\$ -	\$ 2,000,000	\$ -	\$ -	\$ -	\$ 2,000,000		
SCR 91900-050 Real Estate Agency									
Package 102: Compliance & Audits Division Staffing									
Personal Services	\$ -	\$ -	\$ 529,146	\$ -	\$ -	\$ -	\$ 529,146	3	3.00
SCR 91900-050 Real Estate Agency									
Package 103: HR/DEJ/Communication Staffing									
Personal Services	\$ -	\$ -	\$ 239,266	\$ -	\$ -	\$ -	\$ 239,266	1	1.00
TOTAL ADJUSTMENTS	\$ -	\$ -	\$ 3,076,215	\$ -	\$ -	\$ -	\$ 3,076,215	5	5.00
SUBCOMMITTEE RECOMMENDATION *	\$ -	\$ -	\$ 14,103,674	\$ -	\$ -	\$ -	\$ 14,103,674	34	34.00
% Change from 2021-23 Leg Approved Budget	0.0%	0.0%	39.1%	0.0%	0.0%	0.0%	39.1%	13.3%	14.3%
% Change from 2023-25 Current Service Level	0.0%	0.0%	27.9%	0.0%	0.0%	0.0%	27.9%	17.2%	17.2%

*Excludes Capital Construction Expenditures

Legislatively Approved 2023 - 2025 Key Performance Measures

Published: 4/18/2023 2:23:58 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 2024	Target 2025
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	87%	80%	80%
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	98%	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	75%	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	93%	93%	93%
	Overall		93%	93%	93%
	Timeliness		94%	93%	93%
	Accuracy		94%	93%	93%
	Expertise		93%	93%	93%
	Helpfulness		93%	93%	93%

LFO Recommendation:

The Legislative Fiscal Office recommends approval of the Key Performance Measures and targets as proposed.

SubCommittee Action:

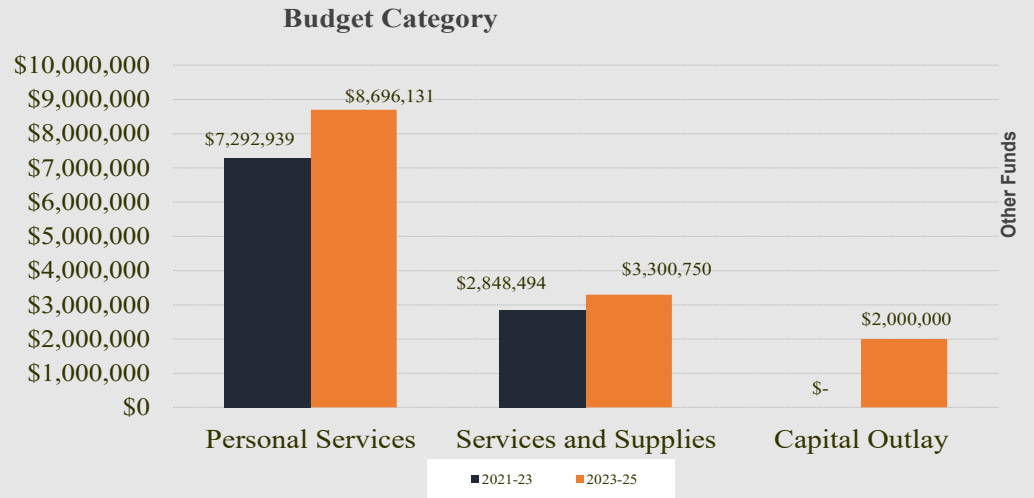
The Subcommittee approved the Key Performance Measures with the following modifications, directed LFO to change the Customer Service Targets to be a consistent 93%.

Legislative Adopted Budget

(All Other Funds)

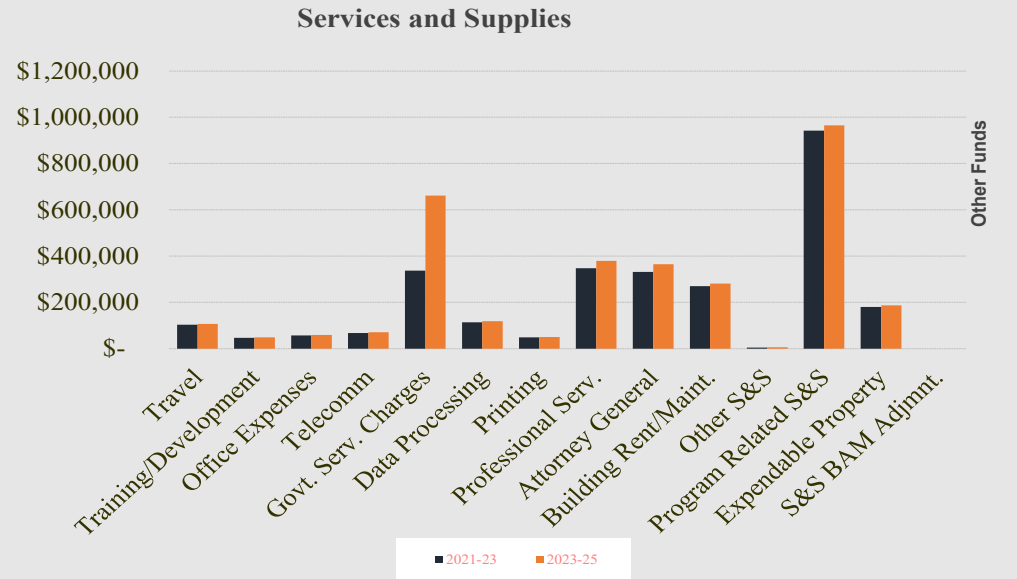
Budget Category

	2021-23	2023-25	Difference
Personal Services	\$ 7,292,939	\$ 8,696,131	\$ 1,403,192
Services and Supplies	\$ 2,848,494	\$ 3,300,750	\$ 452,256
Capital Outlay	\$ -	\$ 2,000,000	\$ 2,000,000
Total	10,141,433	13,996,881	3,855,448



Services and Supplies

	2021-23	2023-25	Difference
Travel	\$ 103,008	\$ 107,334	\$ 4,326
Training/Developmen	\$ 46,666	\$ 48,626	\$ 1,960
Office Expenses	\$ 56,611	\$ 58,989	\$ 2,378
Telecomm	\$ 67,400	\$ 70,231	\$ 2,831
Govt. Serv. Charges	\$ 336,730	\$ 661,687	\$ 324,957
Data Processing	\$ 113,997	\$ 118,785	\$ 4,788
Printing	\$ 48,284	\$ 50,311	\$ 2,027
Professional Serv.	\$ 348,043	\$ 378,671	\$ 30,628
Attorney General	\$ 330,963	\$ 365,688	\$ 34,725
Building Rent/Maint.	\$ 270,272	\$ 281,623	\$ 11,351
Other S&S	\$ 4,097	\$ 5,301	\$ 1,204
Program Related S&S	\$ 942,499	\$ 966,023	\$ 23,524
Expendable Property	\$ 179,924	\$ 187,481	\$ 7,557
S&S BAM Adjmnt.			
Total	\$ 2,848,494	\$ 3,300,750	\$ 452,256



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 market atmosphere.

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

Program Descriptions

The primary divisions and programs of OREA 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 OREA. The Commissioner's office is responsible for the drafting of notices of intent and other administrative orders and the final administrative actions taken.

Real Estate Board

The Real Estate Board is authorized to inquire into the needs of the real estate licensees of Oregon, the functions of OREA, 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 licensees, of the public and of real estate businesses in Oregon. The Board shall make recommendations to OREA 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 Divisions

Administrative Services Division: Business Administration and IT

This division manages business and IT 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, Affirmative Action, and Diversity, Equity and Inclusion priorities;
- Purchasing and contracting; and
- Oversight of the agency's Information Systems staff, who provide word, data processing, LAN administration, project management and telecommunications services.

Education & Licensing Division

Education

The purpose of this program is to oversee the administration of examination, and education services, and education compliance related activities provided to applicants and 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 program carries out OREA's mission by increasing the quality, format, and number of educational opportunities for licensees that will, in turn, increase the professionalism among licensees. This program 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, and developing and implementing effective licensing examinations.

Program functions include:

- Coordinating the development and maintenance of examinations and test items;
- 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.

Licensing

The purpose of this program is to administer the licensing of real estate brokers, principal brokers, and property managers, the registration of business names, continuing education providers, prelicense education providers, escrow agents, unit owner's association registrations, and the online submission of condominium filings.

Program functions include:

- Assisting real estate brokers, principal brokers, property managers and escrow agencies as they use the Agency's online licensing system (eLicense) to manage their licenses;
- Assisting customers as they process registered business names and branch office registrations in eLicense;
- Registering 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;
- Certifying continuing education providers; and
- Providing general reception, licensing, and compliance information to the public.

Complaint Intake & Public Inquiry

The purpose of this program is to administer the intake and jurisdictional review of incoming complaints, assessing complaint for appropriateness for Agency investigation.

Program functions include:

- Supporting licensees and members of the public in navigating the complaint process;
- Entering complaint data and registering complaint-related information in the agency's database, necessary for accurate tracking and statistical performance-related reporting;
- Requesting additional complaint related support documentation related to the real estate transaction or property management issue;
- Notifying parties to the complaint and requesting response;
- Assessing complaint materials for potential licensing law violation and Agency jurisdictional authority;
- Administering education letters of advice, when appropriate;
- Closing complaints outside of Agency jurisdiction and providing complainant with additional resources to address their concerns; and
- Elevating complaints to the investigation status and preparing for investigator assignment.

Compliance & Audits Division

The Compliance & Audits Division ensures that licensees meet their fiduciary and administrative responsibilities through the review of financial and administrative records.

The purpose of this program is to conduct compliance-related activities. This work includes providing technical assistance and sharing knowledge on the interpretation and application of laws and rules administered by OREA (excluding legal advice) to licensees, the public, and other governmental agencies.

Division functions include:

- Conducting compliance review, including evaluate compliance surveys and assisting licensees in coming into compliance within target of 45 days when possible;
- Performing annual reviews of escrow agents' financial statements and auditing organizations as directed by the Commissioner per ORS 696.541; and
- Assessing compliance reviews and identifying cases for investigation through clients' trust account reconciliation reviews.

Land Development Division

The division is responsible for administering the Land Development Programs, including subdivision, condominium, timeshare and campground registrations, telemarketing organization licensing, on-site inspections, and Public Report issuance. It also administers the Telemarketing Organizations Program, which licenses and regulates real estate telemarketing organizations. The Land Development manager is responsible for drafting of legislation and rules.

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, reconciliation review and complaint files. The purpose of OREA 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. The primary role of this division is to investigate complaints and make recommendations for appropriate resolution of case based on statutes and rules.

Customers

OREA's customers include:

- Members of the general public who are involved in, or have an interest, in real estate, property management, escrow, and land development activities, who are complainants against licensees and registrants, and who make informational requests;
- Applicants for licensure;
- Licensees/registrants, including real estate brokers, property managers, organizations, escrow agents, escrow branch offices, campground brokers, and telemarketing organizations;
- Developers of subdivisions, condominiums, timeshare estates, and membership campgrounds;
- Attorneys, representing members of the public, licensees, and developers, with questions on the application of law or in matters of a complaint or an 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 real estate educational interests; and
- Governmental organizations including local District Attorneys, police, and land planning organizations; the Oregon Attorney General, the Oregon Department of Justice Consumer Protection and Criminal Justice Divisions, State Police, Oregon

Housing & Community Services, Oregon 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 licensing agencies.

Source of Funding

OREA's revenue source is Other Funds derived primarily from licensing related fees.

Expenditures

Other Funds expenditures in Legislatively Adopted Budget for 2023-2025 is **\$13,996,881**.

FTE

Full time equivalent positions authorized by the agency's 2023-25 Legislatively Adopted Budget is 34.00.

Agency Plans

2023-25 Short-Term Agency Plan

1. eLicense System Replacement

The foremost goal in the 2023-2025 biennium is to replace OREA's existing licensing and regulatory software. Originally launched in 2012, with a user experience upgrade in 2015, eLicense (by Tyler Technologies) is the principal platform for conducting business with OREA. eLicense serves as the core repository for licensee data, license and business application processing, and audit/case management tracking. All work is administered in the electronic environment of eLicense. As this system is now approaching the intended replacement stage in its asset life cycle, it is imperative to execute the replacement work timely and avoid extending the product beyond its optimized use. OREA is in the planning stages and aims to seize this opportunity to deliver a tool that improves service, meets the expectations of the public and licensees, and creates efficiencies in all business lines and program functions.

The agency's key external partners are real estate licensees, who tend to be early adopters and heavy users of technology for business. They expect a frictionless, fluid experience when engaging with the Agency, handled with ease from a mobile device and without high-touch customer service support. In 2017, the Oregon State Legislature approved real estate licensing fee increases of 30%. The industry testified in support of the increase with an understanding and expectation it would be used to rebuild OREA's reserve funds in time to replace the existing system as planned and to maintain a current, user-focused licensing and regulatory software product that serves licensees and better protects Oregon consumers. As was noted in the 2021-2023 budget, OREA made the choice to postpone this request to the 2023-2025 budget for implementation as priorities shifted to maintaining continuity of service in a distanced environment.

OREA estimates that the eLicense Replacement Project will be a two-year effort (Project Close end-of-year 2024) with software and related project costs not to exceed two million dollars (other funds limitation).

If granted funding expenditure limitation by the legislature, the agency will contract for the replacement of the existing eLicense system and deploy a modernized solution. The new system will align with the following initiatives:

- OREA - Strategic Plan
- Framework 2020-2023
- EIS - Cloud Forward
- State of Oregon - Diversity, Equity, and Inclusion Action Plan

Failure to act compromises the agency's ability to conduct business efficiently, meet the expectations of the industry, and maintain alignment with the Agency's strategic plan and statewide modernization initiatives listed above.

2. Ongoing Policy Considerations – External Partner & Interested Party Engagement

OREA will be coordinating a rulemaking work group of external partners related to the *Initial Agency Disclosure Pamphlet*. The pamphlet acts in support of the consumer as a tool to clarify terms and the responsibilities of the licensee. This document is mandated at first contact with a prospective party to a real estate transaction, either electronically or in-person. Oregon does not currently require this document be signed by the consumer, while many other states mandate this action. There is concern in the industry that the passive nature of the current practice does not properly inform the potential client of the duties and responsibilities of the broker. The Agency will also work with external partners and interested parties to ensure the language is more consumer-friendly.

Remain on Pace with Commitments and Further Develop the Affirmative Action and Diversity, Equity, and Inclusion Plans

A key priority brought by Commissioner Strode in 2019 was to broadly expand the OREA's efforts related to diversity, equity, and inclusion and affirmative action. This work bridges from public access to the agency, licensure, and the regulatory outcomes of our work, and full circle to the Board, staff, and human resources management.

The Agency has a robust plan to foster diversity and inclusion within OREA and through external partners in interested party engagement. The goal is to reduce barriers to entry from all perspective. The agency will do this by communicating our values clearly when we speak about what we do and, more so, when we act and follow through on our commitments to affect change. In policy option package 103 within this budget, OREA seeks to establish an internal human resources specialist to hold responsibility for the execution and ongoing development of our Affirmative Action and Diversity, Equity and Inclusion plans as well as to improve communications, bringing in various voices and developing OREA's network for a more diverse reach in recruitments for positions at all levels of the agency.

Within the Agency's 2021-2023 Legislative Budget Presentation, the Commissioner expanded on these efforts, establishing the clear goal, under a series of tasks, to expand the reach of agency services and dismantle institutional barriers.

We continue to further these efforts through the goal to Reduce Barriers to Licensure. To date, OREA has established a Spanish-speaking position, published educational content in Spanish, engaged with our examination vendor to begin the steps necessary to implement prelicense examination in languages other than English, and started conversations with our prelicense education providers to assess where opportunities and needs may intersect.

As OREA's mission is narrowly focused on consumer protection through occupational licensing and regulation of that license, mentorship programs and promoting license application would be out-of-scope for the agency. However, to support organizations that are mission-aligned with the professional development of licensees, OREA intends, at the request of the Oregon Realtors Diversity Committee, to implement demographic, race, and ethnicity data collection from license and renewal applications on a

voluntary basis. This information will be shared with industry partners in aggregate as an aid to further the reduction of barriers to the profession.

Projects to Support Goal & Strategies

- Establish Internal HR Position
- Further Develop External Partner Network
- Identify Additional Priority Languages for Educational Content
- Establish Project Plan for Examination in Spanish
- Establish Educator Partners for PreLicense Education in Spanish
- Identify Accessibility in Languages Other than English as a Requirement of Licensing Replacement System
- Identify and Enroll Public Facing Staff in Cultural Competency Training

2023-27 Long-Term Agency Plan

1. Compliance Division & Associated Programs

In 2022, the Agency established the new Compliance & Audits Division, dedicated to focus deeply and narrowly on compliance-related activities to support fraud prevention and embolden OREA's audit and financial review work. This division is responsible for analyzing the existing clients' trust account review and escrow audit programs, identifying opportunities to increase the impact of these programs while simultaneously scaling the effectiveness of the agency's actions. OREA seeks to grow this division to grow by adding three additional FTE with the responsibility of reviewing, on a periodic basis, all real estate businesses holding client trust funds and conducting routine escrow audits.

OREA recognizes that client funds held in trust by licensees is among the greatest threats to consumer protection in Oregon and is compelled to increase dedicated resources to address this risk exposure gap.

Near term, work involves making practical adjustments to existing practices, measuring balance performance, and evaluating the success of such changes. This division will review policies, practices, rules, and laws to identify opportunities for greater process efficiency and increased consumer protection.

Projects to Support Goal & Strategies

- Establish New KPM to Baseline and Evaluate Performance
- Increase Production Based on Additional Staff
- Leverage Capabilities of the eLicense Replacement System to Vastly Scale Automated Analysis and Audit Concerns, Scaling Reach of Program for Improved Consumer Protection.

2. Policy Concerns

The policy areas identified in the long-range efforts of OREA have been identified from industry feedback where practitioners and their representative associations have shared concern. Given that any changes to the policies outlined here may affect the practice of real estate activity, change the span of consumer protection, or have a fiscal impact, a thorough evaluation of the legislative history and a reexamination of practice under today's environment is paramount.

A brief overview of each policy area schedule for review, as follows:

Mandatory E&O. Errors and omissions insurance (E&O) is mandatory in approximately 30% of the real estate jurisdictions in the United States and Canada. The models used by these jurisdiction are either a state-managed fund or a regulatory requirement for licensees to independently obtain and maintain E&O insurance for active licensure. Under the latter model, some states manage the vendor process and negotiate through the enterprise competitive bidding process to establish a state-sanctioned provider at a reasonable premium cost. Under both standards, failure to obtain insurance results civil penalties and/or license inactivation.

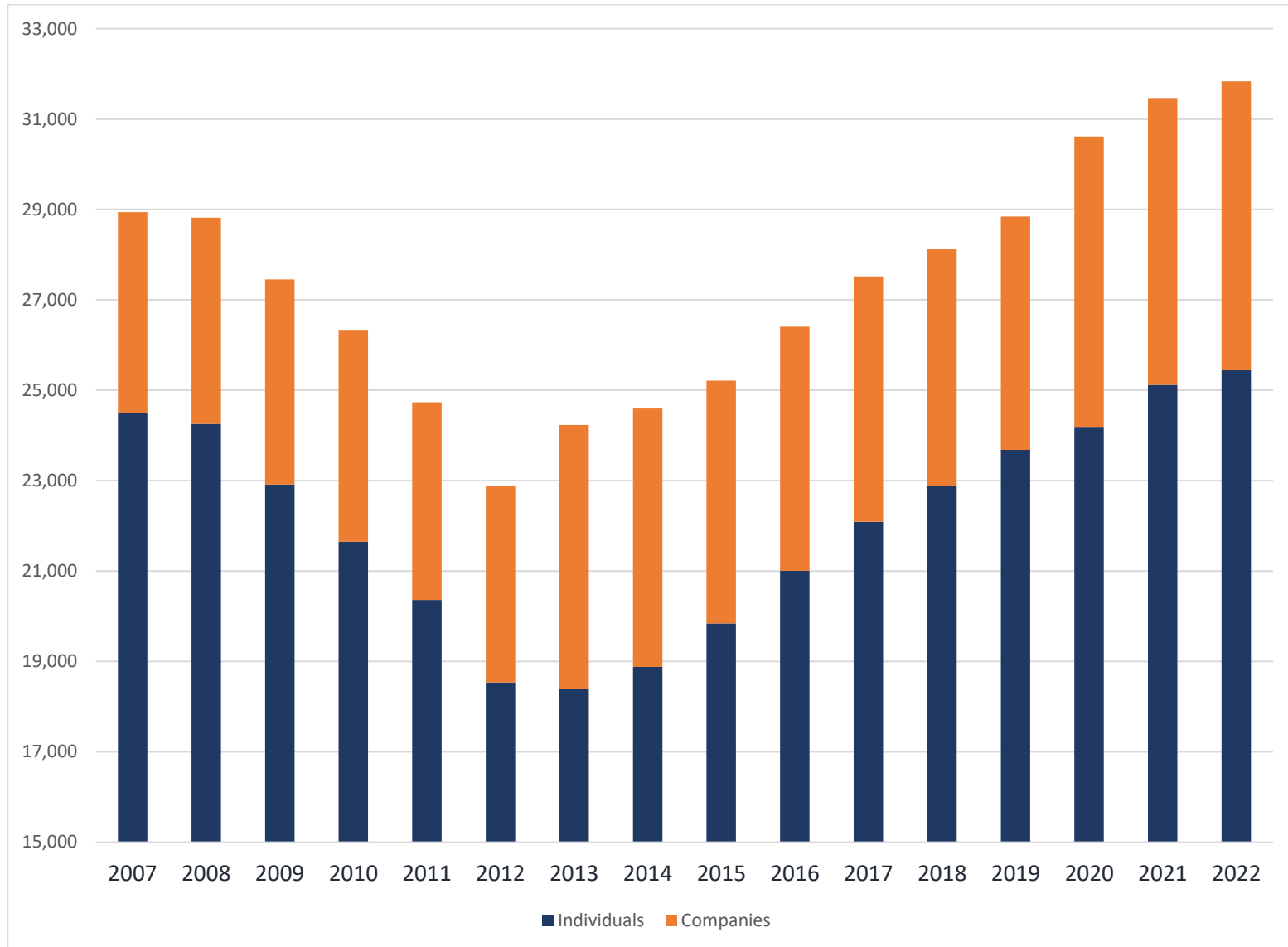
In Oregon, there is no public fund to draw from, or mandatory requirement to have E&O insurance, when inadequate or negligent professional real estate activity conducted by a licensee impacts the consumer in a transaction. OREA's authority is limited to licensing law, and the courts are the venue for restitution of losses if insurance was not obtained. Most real estate brokers currently hold E&O insurance for their own risk management but are cost burdened with high premiums and deductibles. Historically, Oregon has considered this to be the personal business decision of the broker. Instituting either of the models outlined will have a fiscal impact on OREA and will require a policy option package for increase position authority.

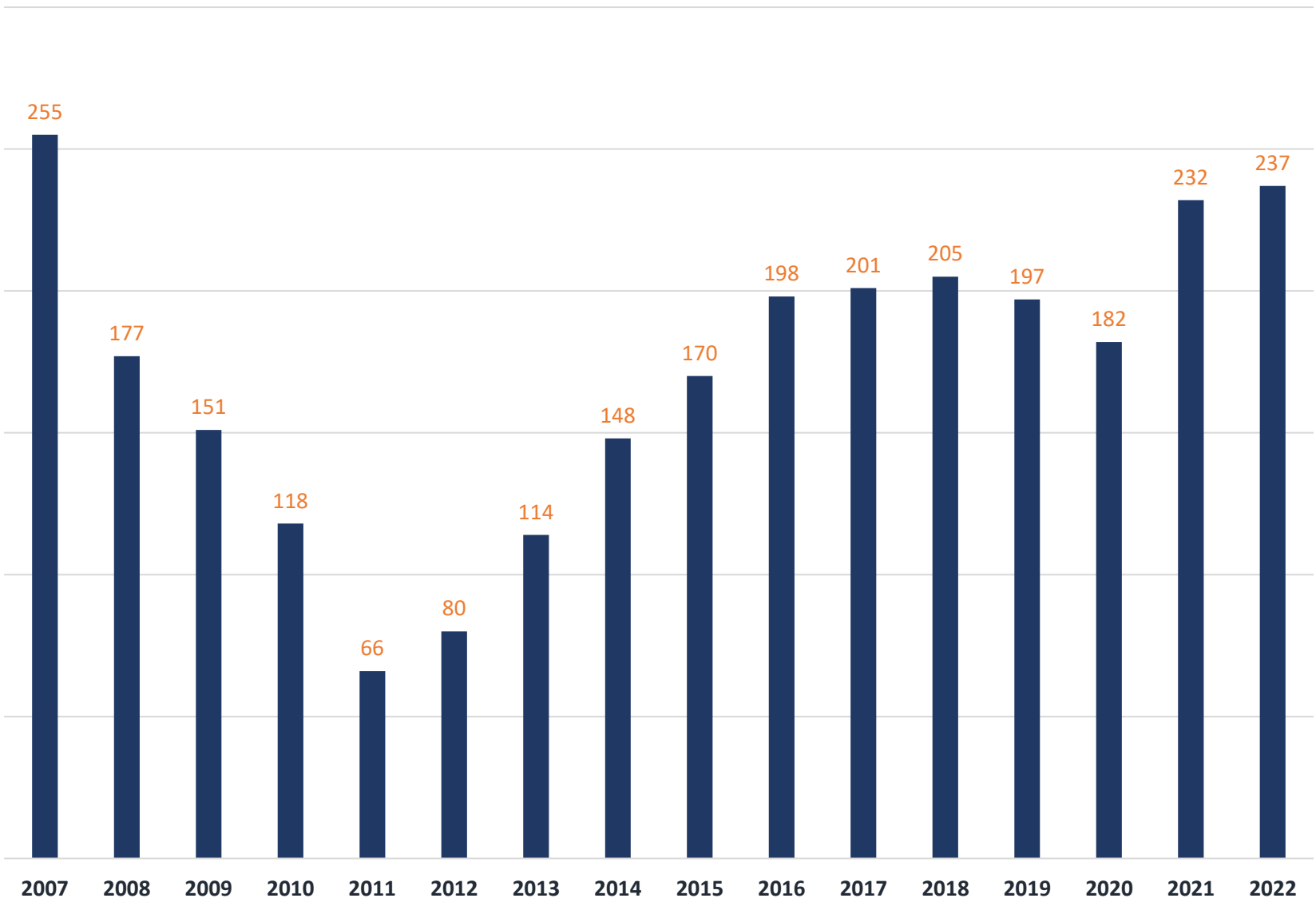
Property Management Bonding, Security in Trust. To protect the funds of the consumer, Oregon law requires the business of an escrow agent to be secured by a surety bond. Industry partners have suggested that a similar practice should be considered for property management deposits held in trust by principal brokers and property managers conducting property management activity. Mishandling of client trust funds is among OREA's chief regulatory concerns with the potential for significant impact to the consumer. The agency would need to conduct thorough research to justify the need based on historical cases and to establish the impact on licensees, as bonding may introduce impediments to licensure.

Commission Sharing. In the 2021-2023 Agency Request Budget, OREA identified commission sharing amongst a suite of policy considerations slated for analysis and potential review by industry workgroups. However, before such work could commence, the agency was sued in district court by a national real estate brokerage. The lawsuit challenged the underlying statute related to commission sharing, alleging an anti-trust violation. Rather than proceeding further, the workgroup decided to table this item until pending litigation was resolved. In December of 2021, the case was dismissed. An appeal was

filed but subsequently revoked in May 2022. Now that the matter is resolved, the Agency will reapproach industry groups to examine if the existing law is providing necessary consumer protection or if changes should be considered.

License Counts





■ New Licenses by Monthly Average

Environmental Factors

Industry Environment*

Real estate sales and property management activity are driving forces in Oregon's economy, deeply affecting consumer confidence and their sense of affordability in the state. Doubtlessly, there is justified anxiety over housing costs among buyers and renters. Born of increased interest rates, higher than average inflation in recent years, and the possibility of a looming recession. However, several factors favor relative stability, or perhaps only a modest correction, rather than a deep crash akin to the 30% price declines experienced in the housing market bubble and the related Great Recession, starting in 2008.

According to Lawrence Yun, Chief Economist at National Association of Realtors, we are likely to experience a slowdown of sales on the order of approximately, 13% in sales volume, though prices are not expected to decline in all markets. NAR estimates that prices nationally will continue to climb by around 5% by 2025 though West Coast cities may remain flat or experience slight declines. This combination of lower volume and higher price is reflective of the under supply in new housing developments nationally, though a distinct issue in Oregon as well. Low supply urges competition over price, even when there are fewer buyers able to enter the market due to higher mortgage interest rates. This was not a factor in 2008 when there was a distinct oversupply issue. Prices in Oregon remain unlikely to experience a bursting bubble, not just due to limited supply but also because high-risk sub-prime mortgages no longer pose a threat following the passage of The Dodd-Frank Act and greater regulation in the lending industry. For homeowners, this means that they have amassed considerable wealth through equity and will retain the mobility to participate in the market should they have a need or desire.

In Oregon, sales continue to move relatively quickly when comparing to activity over a five year timeline. Sentiment is however cooling, and many may be inclined to take some time to consider their entry point but ultimately the demand for housing persists albeit at a less frenetic pace.

To date, OREA has seen a sizable pullback in new applications, with a 32% decline in new license entrants between 2021 and 2022. Whether this is only a temporary retracement or a longer-term downward trend has yet to be determined. Overall, despite the pessimism, economic growth in Oregon is robust with increased wages and low unemployment.

*The information above comes from a quarterly report prepared by Portland State University, School of Business Administration: Center for Real Estate, Inman, National Association of Realtors, RMLS, Oregon Office of Economic Analysis, and Kiplinger.

Administrative Environment

HB 2550

In 2021, the Oregon legislature enacted HB 2550, known as the "love letter" law. On March 3, 2022, the U.S. District Court for the District of Oregon issued a preliminary injunction enjoining enforcement of the law. On May 11, 2022, the Court approved a

consent decree which permanently prohibits enforcement of the law. In accord with the terms of the consent decree, the Oregon Real Estate Agency will not enforce HB 2550, codified at ORS 696.805(7).

Internal Environment

Staffing

OREA has implemented a hybrid remote work atmosphere for all staff except for reception, which has full time in office responsibilities. Staff have adapted to the remote environment successfully, demonstrated by improved performance across divisions. All managers are responsible to meet with staff in one-on-one meetings on a bi-weekly basis and hold Division meetings at least monthly. The Regulation Division meets in-person monthly for team meetings while other divisions meet at least quarterly as a team in person. The agency holds monthly all staff meetings, gathering in the office two or three times per year as an entire Agency. Otherwise, team communication is supported through videoconferencing, telephone, and Agency webchat. Licensing & Education management will continue to measure customer service delivery via monthly electronic surveys to customers to ensure quality and Regulation Division management will review key performance measures related to case production as well as lead review of case investigations for quality and consistency. Agency management assesses the existing talents and skills of employees through quarterly performance accountability feedback meetings to establish training needs, goals, provide critical performance feedback and monitor progress.

Technology and Systems

Prior to the stay home requirements at the onset of COVID-19, OREA received physical documents for filings and investigations from external parties. When the documents were received electronically the agency printed the documents to establish a physical file. The new environment did not allow OREA to continue in that manner. The agency quickly transitioned to mandated electronic receipt of complaints and supplementary evidence. We also moved all condominium filings, as well as the associated revenue receipting, to the online licensing platform. Once the file was established in an electronic manner, it allowed for greater accountability and oversight on the progress of the work, increased data capture for reporting and statistics, faster access to documents and easier access for public records requests, and simplified submission for complainants and developers. In addition, OREA has moved primary communication to email and DocuSign, using regular mail when statutorily mandated for service or there is no other available form of communication.

These efforts have been part of the OREA's longer-range goals. While these are significant advances forward, the agency now seeks to make a major long-term investment in the agency-wide licensing and case management system upgrade. See POP 101, eLicense Replacement System, for expectations related to the new system.

Consumer Protection

OREA 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

OREA 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

OREA 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 2023-25 biennium for this review process as needed. Work groups have historically included the Commissioner, OREA staff, Board members, educators, 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 implementing standards and regulation, delivering quality education and examination services, and developing Legislative Concepts.

Criteria for 2023-25 Budget Development

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

To achieve its goals, the budget criteria are to:

- Deliver a new licensing and regulatory technology system that:
 - Produces operational efficiencies in the work of the agency,
 - Reduces processing times experienced by applicants,
 - Modernizes the user experience for real estate business managers and renewing licensees,
 - Provides greater transparency to the public, and
 - Ensures the security of data held by the Agency.
- Expand the reach and efficiency of regulatory effectiveness through the implementation of the Compliance Division, thereby increasing clients' trust account reconciliation reviews and escrow audits.

- Onboard a dedicated Human Resources Analyst-AA/DEI Coordinator to meet the commitments of the AA/DEI Plan and expand outreach to underrepresented communities.
- Continue to keep the Board and industry actively involved with the agency and the Commissioner through outreach and engagement, relying on technology more than ever before.
- Engage with the regulated community seeking continuous feedback on the effectiveness of all OREA programs.
- Conserve reserve funds to the greatest degree possible for expected reductions in revenue and the planned technology replacement project in 2023-2025, approximated at \$2,000,000 in capital outlay and \$307,803 in personal services for a limited duration, Project Manager, in an Operations & Policy Analyst 3 position.

Major Information Technology Projects \$2,307,803

eLicense Replacement System POP 101

IT Strategic Plan 2023-2027

Security, Efficiency, Accessibility and Transparency

The targets of the OREA Strategic IT Plan reach across all agency divisions, managers, and staff. These efforts will require ongoing input from front-line personnel as well as expansive planning and coordinated implementation with external partners, within state government, and in the industry. The Agency values input from our internal and external partners, recognizing that the efforts laid out in this plan cannot be realized effectively without a holistic, inclusive approach.

As each division, and the manager responsible, implements the strategies and goals identified in this plan, they will operate under this philosophy.

OREA's Plan sets forth the following guiding principles:

- **Regulatory Effectiveness (Appropriateness & Adaptability to Change)**

We regulate from a perspective of consumer and licensee impact. We are dedicated to adaptability as the practice evolves. In collaboration with our external partners, we continually evaluate our governing regulatory framework within the context of the current market atmosphere.

- **Operational Excellence (Innovation & Stewardship)**

As stewards of licensing fees, to fund Agency operations, we are responsible for conducting business efficiently and effectively. We implement innovative, cost-effective tools that deliver a measurable return on the investment.

- **Service Driven (Customer Service Excellence, Equity & Transparency)**

We believe that equity is foundational to excellent customer service. We aim to provide all who engage with the Agency an opportunity to be heard and understood, providing transparency, resources, and assistance in a timely manner.

- **Professionalism (Accountability & Respect)**

In all aspects of our work, we are accountable to the public, licensees, and all of our external partners. We maintain an environment of inclusion, showing respect for all parties we engage with. We provide accurate information, consistently, and reliably.

Information Technology Strategic Goal 1: Security & Efficiency (eLicense & existing system upgrades)

eLicense acts as the primary information system of the Oregon Real Estate Agency, used by all agency staff and external partners to conduct business for licensure, audits, and case management, public inquiry, land development filings, escrow bonding, and revenue reconciliation. Over 40,000 licensees, business registrants, and external partners engage with the system in a user-facing capacity. 25,000 licensees actively utilize the system for their biennial licensee renewal, updating contact information, background information, and continuing education.

Business operators are responsible for maintaining their organizations online, transferring applicants and existing licenses into their business, maintaining their clients' trust accounts information, responding to audits, and renewing their business registrations annually. All of this, including the associated payments when applicable, is conducted exclusively through the eLicense system. The Agency has not accepted paper applications since 2012.

The internal, agency-facing component of eLicense operates as a licensing database and case management software, integrating license application and maintaining information within the complaint and investigation module. The system administers automated email communication to licensees for notification purposes, revenue intake, bank reconciliation processes, statistical license and investigative process reporting, examination data imports, and several automated workflows and validation processes to process a variety of applications. While this system has performed the functions it was designed for and allowed OREA to navigate to a paperless environment, the agency's primary external partners, real estate licensees, are cutting-edge users of technology who conduct their work in a highly-efficient, mostly digital manner. There are many known efficiencies required to modernize the system to meet licensee needs, as well as several opportunities to improve the internal security and operations of OREA's internal work.

OREA expects a new system will be launched in the spring of 2024. The agency anticipates the upgraded product will vastly improve all end users' experience as well as save licensees and the agency substantial time.

Information Technology Strategic Goal 2: Cybersecurity

In the fall of 2021, the Department of Administrative Services-Enterprise Information Services conducted a cybersecurity review of OREA's information systems. While the agency was rated above average statewide, many opportunities were found that will improve systems and reach a higher standard of best practices.

This biennium and next, OREA will establish granular tasks to improve its overall cybersecurity score.

Core Work

Update agency systems in a timely manner that promotes security of customer data and increases efficiency for end-users.

Projects to Support Goal & Strategies

- Complete Business Case and Project Plan to Replace eLicense.
- Submit Policy Option Package for Funding for the eLicense Replacement System Project
- Implement Cybersecurity Updates from 2021 Cybersecurity Assessment
- Exploit Opportunities for Continued Automation Amongst Agency Systems

OREA | eLicense Replacement

Stage Gate	New	Fund Type Mix	100% OF	Agency Score	100
Magnitude	Small (\$1-5M)	Agency IT Governance	Agency executives	EIS Score	93
Modernization	Yes	Project Focus	Technology Re-Investment	Alignment	No

Project Purpose

Originally deployed in 2012, the current system (eLicense) is the primary platform for conducting business within Oregon Real Estate Agency (OREA) and it is used to manage licensee data, process licensee and business applications, enable continuing education (CE) reporting, and to support case management for audits.

While the shift from paper-based mail-in forms to eLicense was transformational at the time, the product has not been upgraded since 2015 and is showing its age. End-users within the real estate agency and OREA staff have documented a growing list of pain points and system limitations. At the same time, the confusing and unintuitive system navigation for the eLicense system is responsible for 50% of the help desk calls the agency receives—diverting limited staff resources.

This investment seeks to replace eLicense, with a modern, intuitive, accessible, and mobile-friendly, licensing system, that will enable OREA to meet customer and employee expectations, reduce its support burden, eliminate pain points and limitations of the current system, and to optimize service delivery through integrations and intelligent automation.

Technology and Strategic Alignment (35%)

Alignment to Strategic Plans

Score of 3 is supported.

- The 2021-23 OREA Strategic Plan specifically identifies eLicense replacement as one of its top 5 agency goals.
- Licensing system modernization will enable OREA to optimize service delivery for its constituents and put people first—providing an application that is intuitive, mobile-friendly, self-service enabled, ADA accessible, and that provides support for multiple languages.

Technology Best Practices and Priorities

Score of 3 is supported.

- While explicit discussion of enterprise information technology priorities is limited, the targeting of a secure, vendor-managed SaaS/PaaS solution with a strong emphasis on usability is fully consistent with EIS strategies and guiding principles.

Business and People-Centered Approach (25%)

People-Centered Approach

Score of 3 is supported.

- The emphasis on usability and enhanced service delivery accounts for both end-user and employee perspectives.
- By enabling support for multiple languages, ensuring ADA accessibility, and supporting mobile devices, this investment will increase the accessibility of services for diverse populations.

Business Process Transformation

Score of 3 is supported.

- This investment would enable new opportunities for streamlining internal operations and enhancing service delivery—a modern licensing system would provide enhanced document management, improved case management functionality, support for multiple communication channels, enhanced search

- capabilities, configurable reporting capabilities, and enable both integrations and automations.
- Score of 3 is supported.
- In 2017, OREA increased its licensing fees by 30% to rebuild its reserves and fund the replacement of eLicense, failure to replace the current system would undermine the trust of stakeholders within the real estate agency who supported the fee increase.
 - Continued reliance on eLicense limits opportunities for improved service delivery, process improvement, and contributes to an increasingly unsustainable support burden; e.g., help desk calls and manual input of all CE information.
 - The current eLicense system is effectively end-of-life and no future upgrades or enhancements are anticipated.

Agency Readiness and Solution Appropriateness (40%)

- | | | |
|---|----------|--|
| Organizational Change Management (OCM) | 2 | <p>Score of 3 is not supported.</p> <ul style="list-style-type: none"> • EIS recommends a score of 2 for Organizational Change Management (OCM). • OREA leadership is championing this initiative and ensuring that employees are actively engaged in documenting the pain points of the current system, gathering business requirements, and envisioning the future state. |
| Solution Scale and Approach | | <p>Score of 3 is supported.</p> <ul style="list-style-type: none"> • As eLicense is the primary business platform within OREA and their experience with the 2012 deployment, the agency has deep institutional knowledge of the current system, the business problems it poses, and the capabilities the agency and its stakeholders require. • Given the nature of OREA's work and its constituents, the deployment of a modern licensing system with case management functionality is specifically tailored to its needs and given the strategic importance of this investment, OREA leadership is committed to engaging their customers in the identification and deployment of the new system. |
| Capacity | | <p>Score of 3 is supported.</p> <ul style="list-style-type: none"> • OREA has a highly engaged Executive Sponsor in their Deputy Commissioner, Anna Higley—a certified project manager who led the implementation of eLicense in 2012. • The agency also recently hired a Project Manager/Business Analyst specifically for the purpose of supporting this investment. • While this investment will likely require additional capacity (e.g., OCM) as they move into project initiation, they are positioned to bring on these resources as necessary. |
| Governance and Project Management Processes | 2 | <p>Score of 3 is supported.</p> <ul style="list-style-type: none"> • EIS recommends a score of 2 for Governance and Project Management Processes. • While OREA may lack a standalone IT governance body and have limited experience with EIS engagement and oversight—eLicense would be their first project subject to the Stage Gate Oversight model—the investment reflects long-term planning and was approved by the agency's Board. • Additionally, OREA is currently working to establish a Steering Committee to guide this initiative. |

Summary of 2023-2025 Budget 919 REA

	TOTALS			FUND TYPE				
	POS	FTE	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Non-limited Other
2021-23 Legislatively Approved Budget	29	29	10,141,433			10,141,433		
Base Budget Adjustments:								
Net Cost of Position Actions:								
Administrative, Biennialized E-Board, Phase-Out			320,888			320,888		
Estimated Cost of Merit Increase								
Base Debt Service Adjustment								
Base Nonlimited Adjustment								
Capital Construction Adjustment								
Subtotal: 2023-2025 Base Budget	29	29	10,462,321			10,462,321		
Essential Packages:								
Package No. 010								
Temporary Appts., Overtime, Differential			12,445			12,445		
Vacancy Factor Increase/(Decrease)			<u>(6,356)</u>			<u>(6,356)</u>		
Subtotal			6,089			6,089		
Package No. 021/022								
021 - Phased-In Programs Excl. One-Time Costs			0					
022 - Phase-Out Programs and One-Time Costs			<u>0</u>					
Subtotal								
Package No. 031								
Cost of Goods & Services Increase/(Decrease)			166,084			166,084		
State Gov. Service Charges Increase/(Decrease)			392,965			392,965		
Subtotal			559,049			559,049		
Package No. 101 eLicense Replacement System								
Cost of Goods & Services Increase/(Decrease)			2,000,000			2,000,000		
Personal Services Increase/(Decrease)			307,803			307,803		
Subtotal								

Package No. 102 Compliance & Audits Staffing			2,307,803			2,307,803		
Personal Services Increase/(Decrease)		Sal & Wages	325,512			325,512		
		OPE	203,634			203,634		
Subtotal			529,146			529,146		
Package No. 103 HR/DEI Staffing								
Personal Services Increase/(Decrease)		Sal & Wages	158,424			158,424		
		OPE	80,842			80,842		
Subtotal			239,266			239,266		
Package No. 810 LFO & Price List Adjustments								
Cost of Goods & Services Increase/(Decrease)			(106,793)			(106,793)		
Subtotal Policy Packages			3,534,560			2,969,422		
Total: 2023-25 Legislative Adopted Budget	34	34	13,996,881			13,996,881		
Percent Change From 2021-23 Leg. Approved	--%	--%	38.02%	--%	--%	38.02%	--%	--%
Percent Change From 2023-25 Current Service Level	--%	--%	26.93%	--%	--%	26.93%	--%	--%

Summary of 2023-25 Biennium Budget

Real Estate Agency
Real Estate Agency
2023-25 Biennium

Leg. Adopted Budget
Cross Reference Number: 91900-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2021-23 Leg Adopted Budget	29	29.00	9,768,489	-	-	9,768,489	-	-	-
2021-23 Emergency Boards	1	0.75	372,944	-	-	372,944	-	-	-
2021-23 Leg Approved Budget	30	29.75	10,141,433	-	-	10,141,433	-	-	-
2023-25 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	(0.75)	320,888	-	-	320,888	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2023-25 Base Budget	29	29.00	10,462,321	-	-	10,462,321	-	-	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(6,356)	-	-	(6,356)	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	12,445	-	-	12,445	-	-	-
Subtotal	-	-	6,089	-	-	6,089	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
Subtotal	-	-	-	-	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	166,084	-	-	166,084	-	-	-
State Gov't & Services Charges Increase/(Decrease)			392,965	-	-	392,965	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2023-25 Biennium

Leg. Adopted Budget
 Cross Reference Number: 91900-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	559,049	-	-	559,049	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2023-25 Current Service Level	29	29.00	11,027,459	-	-	11,027,459	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
Real Estate Agency
2023-25 Biennium

Leg. Adopted Budget
Cross Reference Number: 91900-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal: 2023-25 Current Service Level	29	29.00	11,027,459	-	-	11,027,459	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2023-25 Current Service Level	29	29.00	11,027,459	-	-	11,027,459	-	-	-
080 - E-Boards									
081 - June 2022 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
090 - Analyst Adjustments	-	-	-	-	-	-	-	-	-
091 - Additional Analyst Adjustments	-	-	-	-	-	-	-	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
093 - Statewide Adjustment DAS Chgs	-	-	-	-	-	-	-	-	-
801 - LFO Analyst Adjustments	-	-	-	-	-	-	-	-	-
802 - Vacant Position Reductions	-	-	-	-	-	-	-	-	-
810 - Statewide Adjustments	-	-	(106,793)	-	-	(106,793)	-	-	-
811 - Budget Reconciliation	-	-	-	-	-	-	-	-	-
813 - Policy Bills	-	-	-	-	-	-	-	-	-
816 - Capital Construction	-	-	-	-	-	-	-	-	-
101 - eLicense Replacement System	1	1.00	2,307,803	-	-	2,307,803	-	-	-
102 - Compliance & Audits Division Staffing	3	3.00	529,146	-	-	529,146	-	-	-
103 - HR/DEI/Communications Staffing	1	1.00	239,266	-	-	239,266	-	-	-
Subtotal Policy Packages	5	5.00	2,969,422	-	-	2,969,422	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2023-25 Biennium

Leg. Adopted Budget
 Cross Reference Number: 91900-000-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Total 2023-25 Leg. Adopted Budget	34	34.00	13,996,881	-	-	13,996,881	-	-	-
Percentage Change From 2021-23 Leg Approved Budget	13.33%	14.29%	38.02%	-	-	38.02%	-	-	-
Percentage Change From 2023-25 Current Service Level	17.24%	17.24%	26.93%	-	-	26.93%	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
Real Estate Agency
2023-25 Biennium

Leg. Adopted Budget
Cross Reference Number: 91900-050-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2021-23 Leg Adopted Budget	29	29.00	9,768,489	-	-	9,768,489	-	-	-
2021-23 Emergency Boards	1	0.75	372,944	-	-	372,944	-	-	-
2021-23 Leg Approved Budget	30	29.75	10,141,433	-	-	10,141,433	-	-	-
2023-25 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	(0.75)	320,888	-	-	320,888	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2023-25 Base Budget	29	29.00	10,462,321	-	-	10,462,321	-	-	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(6,356)	-	-	(6,356)	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	12,445	-	-	12,445	-	-	-
Subtotal	-	-	6,089	-	-	6,089	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase-in	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
Subtotal	-	-	-	-	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	166,084	-	-	166,084	-	-	-
State Gov't & Services Charges Increase/(Decrease)			392,965	-	-	392,965	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2023-25 Biennium

Leg. Adopted Budget
 Cross Reference Number: 91900-050-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	559,049	-	-	559,049	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2023-25 Current Service Level	29	29.00	11,027,459	-	-	11,027,459	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2023-25 Biennium

Leg. Adopted Budget
 Cross Reference Number: 91900-050-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal: 2023-25 Current Service Level	29	29.00	11,027,459	-	-	11,027,459	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2023-25 Current Service Level	29	29.00	11,027,459	-	-	11,027,459	-	-	-
080 - E-Boards									
081 - June 2022 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
090 - Analyst Adjustments	-	-	-	-	-	-	-	-	-
091 - Additional Analyst Adjustments	-	-	-	-	-	-	-	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
093 - Statewide Adjustment DAS Chgs	-	-	-	-	-	-	-	-	-
801 - LFO Analyst Adjustments	-	-	-	-	-	-	-	-	-
802 - Vacant Position Reductions	-	-	-	-	-	-	-	-	-
810 - Statewide Adjustments	-	-	(106,793)	-	-	(106,793)	-	-	-
811 - Budget Reconciliation	-	-	-	-	-	-	-	-	-
813 - Policy Bills	-	-	-	-	-	-	-	-	-
816 - Capital Construction	-	-	-	-	-	-	-	-	-
101 - eLicense Replacement System	1	1.00	2,307,803	-	-	2,307,803	-	-	-
102 - Compliance & Audits Division Staffing	3	3.00	529,146	-	-	529,146	-	-	-
103 - HR/DEI/Communications Staffing	1	1.00	239,266	-	-	239,266	-	-	-
Subtotal Policy Packages	5	5.00	2,969,422	-	-	2,969,422	-	-	-

Summary of 2023-25 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2023-25 Biennium

Leg. Adopted Budget
 Cross Reference Number: 91900-050-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Total 2023-25 Leg. Adopted Budget	34	34.00	13,996,881	-	-	13,996,881	-	-	-
Percentage Change From 2021-23 Leg Approved Budget	13.33%	14.29%	38.02%	-	-	38.02%	-	-	-
Percentage Change From 2023-25 Current Service Level	17.24%	17.24%	26.93%	-	-	26.93%	-	-	-

Real Estate Agency

Agency Number: 91900

Agencywide Program Unit Summary
2023-25 Biennium

Version: Z - 01 - Leg. Adopted Budget

<i>Summary Cross Reference Number</i>	<i>Cross Reference Description</i>	<i>2019-21 Actuals</i>	<i>2021-23 Leg Adopted Budget</i>	<i>2021-23 Leg Approved Budget</i>	<i>2023-25 Agency Request Budget</i>	<i>2023-25 Governor's Budget</i>	<i>2023-25 Leg. Adopted Budget</i>
050-00-00-00000	Real Estate Agency						
	Other Funds	8,835,714	9,768,489	10,141,433	14,103,674	14,013,928	13,996,881
TOTAL AGENCY							
	Other Funds	8,835,714	9,768,489	10,141,433	14,103,674	14,013,928	13,996,881

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2023-25 Biennium

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Agencywide Program Unit Summary - BPR010

Program Prioritization for 2023-25

Agency Name: OREGON REAL ESTATE AGENCY

2023-25 Biennium

Agency Number: 91900

Program/Division Priorities for 2023-25 Biennium

1	2	3	5	6	7	10	14	15	16	17	18	19	20
Priority (ranked with highest priority first)	Agency Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	OF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	
Agcy	Prgm/ Div												
91900	Compliance & Audits	OREA	Compliance & Audits (Clients' Trust Account Reconciliation Reviews, Compliance Reviews, Escrow Audits)	1	3	2,470,038	\$ 2,470,038		6.00	Y	Y	S	Chapter 696
91900	Education & Licensing	OREA	Customer Service (Complaint intake, Background Investigations, Licensing: Applications, Renewals, Business and Branch Office Registrations.) Education Licensee Outreach (Pre/Post License Education and Exam Development.) Education (Prelicense Education Course Approval, Exam Development & Maintenance, Continuing Education Provider Applications & Renewals)	4, 5	3	3,293,384	\$ 3,293,384		8.00	N	Y	S	Chapters 100, 94, 92
91900	Regulation	OREA	Regulation and Enforcement (Complaints, Investigations, Administrative Actions, Civil Penalty Enforcement)	2, 3	3	4,116,730	\$ 4,116,730		10.00	N	Y	S	Chapter 696
91900	Administrative Services	OREA	Budget, Accounting, Information Technology, Personnel & Payroll, Contracts & Procurement	None	4	2,470,038	\$ 2,470,038		6.00	Y	N	S	Chapter 696
91900	Land Development	OREA	Condominium, timeshare, membership campgrounds registrations, and Real Estate Marketing Organization licensing & regulation	None	3	411,673	\$ 411,673		1.00	N	N	S	Chapters 100, 94, 92
91900	Commissioner's Office	OREA	Commissioner and Deputy Commissioner's office, Real Estate Board and Advisory Group Support, Administrative Rule Reviews and Legislative Concept Development	All	3	1,235,019	\$ 1,235,019		3.00	Y	N	S	Chapter 696
						13,996,881	\$ 13,996,881	0	34.00				

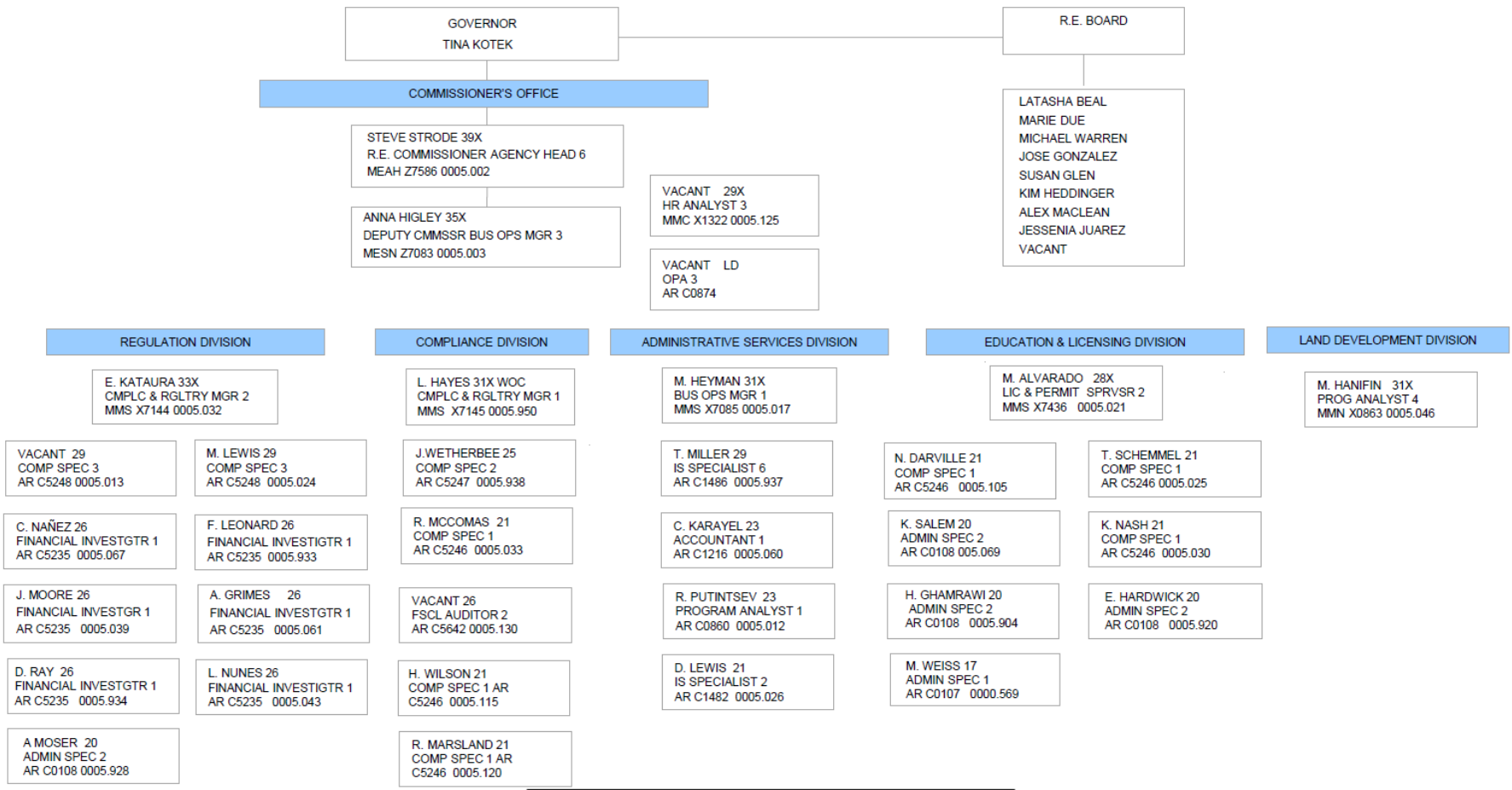
OREGON REAL ESTATE AGENCY

2023 - 2025 Biennium

Detail of Reductions to 2023-25 Current Service Level Budget

1	2	3	4	5	8	12	13	14	15	16
Priority (ranked most to least preferred)	Agency	SCR or Activity Initials	Program Unit/Activity Description	OF	TOTAL FUNDS	Pos.	FTE	Used in Gov. Budget Yes / No	Impact of Reduction on Services and Outcomes	
Dept	Prgm/Div									
Administration	OREA	91900-050-01-00-00000	Temporary Appointments	14,292	\$ 14,292				Management and remaining staff would absorb duties. work product, customer service ratings, and delivery time at risk.	
Administration	OREA	91900-050-01-00-00000	Travel	14,229	\$ 14,229				Reduce travel. Retain all board meetings in the videoconference environment, reduce conference attendance in and out of state.	
Administration	OREA	91900-050-01-00-00000	Training	32,165	\$ 32,165				Reduce staff training by 80%. Significantly reduce training for all staff including management, technical, regulatory certification, and professional development for investigative, compliance, and audit staff. May impact retention, morale and impair quality of service delivery.	
Compliance & Audits	OREA	91900-050-01-00-00000	Staff Reductions	319,416	\$ 319,416				Eliminate two Compliance Specialist I positions. Remaining staff would absorb duties. Work product, client funds, and delivery time at risk.	
Education & Licensing	OREA	91900-050-01-00-00000	Staff Reductions	319,416	\$ 319,416				Eliminate two Compliance Specialist I positions. Management and remaining staff would absorb duties. Work product, customer service ratings, and delivery time at risk.	
Regulation	OREA	91900-050-01-00-00000	Staff Reductions	708,292	\$ 708,292				Eliminate one Compliance Specialist III and two Financial Investigator I positions. Management and remaining staff would absorb duties. Work product, regulatory effectiveness, and delivery time at risk.	
Administration	OREA	91900-050-01-00-00000	Simplified Licensing System Upgrade	691,722	\$ 691,722				Reduce system upgrade features to focus on baseline functionality and a user experience upgrade alone. No significant process improvements. Timeline and product quality at risk.	
				2,099,532	\$ 2,099,532	0	0.00			

2023-25 REAL ESTATE AGENCY
ORGANIZATION CHART (10.30.2023)



REVENUE

Revenue Discussion

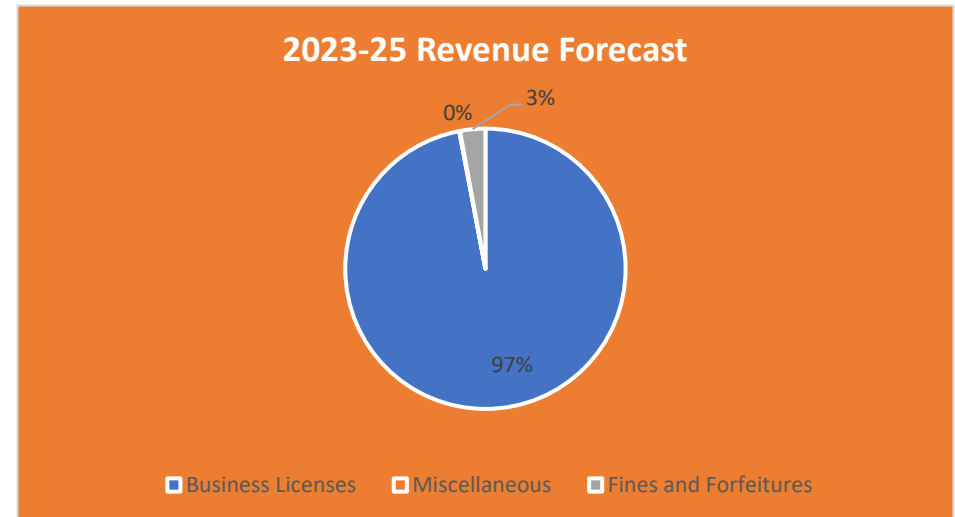
OREA is entirely self-supported through Other Fund (OF) revenues. These funds are derived from license application and renewal fees, as well as other services. All civil penalties assessed by the agency are transferred to the General Fund in accordance with statute. The fee structure will remain the same as the current biennium. OREA is expecting a relatively flat revenue forecast, with the potential for downturn, in the 2023-25 biennium.

The agency is seeing the first sustained, non-seasonal flattening of license counts in more than ten years. This may reflect a cooling urgency in the real estate market and a lessened perception that real estate is an attractive industry to enter. However, renewal numbers are also sustained with no major shifts in lapse rates.

Condominium filings and associated revenues sustained a considerable decline following the pandemic. The attraction to development in high density areas waned with buyers as they sought more space to work from home. Filings haven't yet returned near the pre-Covid levels, having fallen 50% reduction between 2019 to 2020. However, a modest increase has been seen in 2021 and 2022 where activity has leveled at approximately 35% below the 2019 rate. While this line of business has faced the greatest change over the last few years, it only makes up 3-5% of revenue, and its decline does not make an impact on reserves.

The following is a summary of fees:

- Licensing or reactivation exam - The \$75 exam fees and the \$47 applicant criminal background check fees are paid directly to PSI, the agency's exam vendor.
- Application for 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 office, transfer, or change of name or address of a broker - \$10.
- Reactivation of inactive license for Broker or Property Manager - \$150.
- Late renewal - \$150.
- Condominium filing review fees - \$200 per hour.



Revenue by Source

Source	Fund	ORBITS		2021-23		2023-25	
		Revenue Acct	2019-2021 Actual	Legislative Adopted	Agency Request	Governor's Recommended	Legislatively Adopted
Business Licenses	Other	205	\$11,495,871	\$7,239,990	\$10,492,779	\$10,492,779	\$10,492,779
Miscellaneous*	Other	410	\$1,786	\$7,673	\$18,938	\$18,938	\$18,938
Fines and Forfeitures	Other	505	\$286,780	\$216,189	\$426,324	\$426,324	\$490,824
Other Revenues	Other	0975	\$17,015	\$5,846	\$5,300	\$5,300	\$5,300
Transfer to Gen. Fund	Other		(\$57,270)	(\$25,500)	(\$64,500)	(\$64,500)	(\$64,500)
Total			\$11,744,182	\$9,554,160	\$10,943,341	\$10,943,341	\$10,943,341

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

Real Estate Agency
2023-25 Biennium

Agency Number: 91900

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

<i>Source</i>	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
Other Funds						
Business Lic and Fees	11,495,871	7,239,990	7,239,990	10,492,779	10,492,779	10,492,779
Charges for Services	1,788	7,673	7,673	18,938	18,938	18,938
Fines and Forfeitures	286,778	216,189	216,189	490,824	490,824	490,824
Other Revenues	1,946	5,846	5,846	5,300	5,300	5,300
Tsfr From Administrative Svcs	15,070	-	-	-	-	-
Transfer to General Fund	(57,269)	(25,500)	(25,500)	(64,500)	(64,500)	(64,500)
Total Other Funds	\$11,744,182	\$7,444,198	\$7,444,198	\$10,943,341	\$10,943,341	\$10,943,341

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2023-25 Biennium

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Detail of LF, OF, and FF Revenues - BPR012

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

Real Estate Agency
2023-25 Biennium

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

<i>Source</i>	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
Other Funds						
Business Lic and Fees	11,495,871	7,239,990	7,239,990	10,492,779	10,492,779	10,492,779
Charges for Services	1,786	7,873	7,873	18,938	18,938	18,938
Fines and Forfeitures	286,778	216,189	216,189	490,824	490,824	490,824
Other Revenues	1,946	5,846	5,846	5,300	5,300	5,300
Tsfr From Administrative Svcs	15,070	-	-	-	-	-
Transfer to General Fund	(57,269)	(25,500)	(25,500)	(64,500)	(64,500)	(64,500)
Total Other Funds	\$11,744,182	\$7,444,198	\$7,444,198	\$10,943,341	\$10,943,341	\$10,943,341

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2023-25 Biennium

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Detail of LF, OF, and FF Revenues - BPR012

PROGRAM UNITS

Essential and Policy Package Narrative and Fiscal Impact Summary

010 Vacancy Factor and Non-Pics Personal Service

Package Description

This package includes general inflation of 4.2% on non-PICS items of temporaries, overtime, shift differentials, and unemployment compensation. This package increases Personal Services by \$6,089, with \$11,570 Other Payroll Expenses and an increase to vacancy savings \$(6,356) for a total vacancy savings factor of \$(74,318).

Total package is \$6,089 other funds.

2023-2025 Fiscal Impact

No impact.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 010 - Vacancy Factor and Non-ORPICS Personal Services

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
Personal Services							
Temporary Appointments	-	-	679	-	-	-	679
Overtime Payments	-	-	126	-	-	-	126
All Other Differential	-	-	70	-	-	-	70
Public Employees' Retire Cont	-	-	36	-	-	-	36
Pension Obligation Bond	-	-	6,939	-	-	-	6,939
Social Security Taxes	-	-	67	-	-	-	67
Unemployment Assessments	-	-	17	-	-	-	17
Paid Family Medical Leave Insurance	-	-	1	-	-	-	1
Mass Transit Tax	-	-	4,510	-	-	-	4,510
Vacancy Savings	-	-	(6,356)	-	-	-	(6,356)
Total Personal Services	-	-	\$6,089	-	-	-	\$6,089
Total Expenditures							
Total Expenditures	-	-	6,089	-	-	-	6,089
Total Expenditures	-	-	\$6,089	-	-	-	\$6,089
Ending Balance							
Ending Balance	-	-	(6,089)	-	-	-	(6,089)
Total Ending Balance	-	-	(\$6,089)	-	-	-	(\$6,089)

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 2023-25 Biennium

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 Essential and Policy Package Fiscal Impact Summary - BPR013

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 \$559,049. This is based on the biennial general inflation factor which is applied to most Services and Supplies and non-PICS Personal Services costs for 2023-25 of 4.2%. The inflation factor for Professional Services accounts is 8.80%, Attorney General is 17.67%, and State Government Service Charges was 10.61%. OREA's state risk general liability assessment increased 3,658.77%, or by \$215,794, as a result of fees related to litigation defense in the 2019-2021 and 2021-2023 biennia. The agency expects this assessment to reduce significantly in the 2027-2029 biennium, assuming no new litigation is brought against OREA.

2023-2025 Fiscal Impact

Fiscal Impact. OREA has robust reserves to support these higher than customary increases, though an increase of more than half a million will impact the agency's savings.

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
Personal Services							
Temporary Appointments	-	-	-	-	-	-	-
Overtime Payments	-	-	-	-	-	-	-
All Other Differential	-	-	-	-	-	-	-
Public Employees' Retire Cont	-	-	-	-	-	-	-
Social Security Taxes	-	-	-	-	-	-	-
Unemployment Assessments	-	-	-	-	-	-	-
Paid Family Medical Leave Insurance	-	-	-	-	-	-	-
Total Personal Services	-	-	-	-	-	-	-

Services & Supplies							
Instate Travel	-	-	3,885	-	-	-	3,885
Out of State Travel	-	-	441	-	-	-	441
Employee Training	-	-	1,621	-	-	-	1,621
Office Expenses	-	-	2,378	-	-	-	2,378
Telecommunications	-	-	2,831	-	-	-	2,831
State Gov. Service Charges	-	-	392,965	-	-	-	392,965
Data Processing	-	-	4,788	-	-	-	4,788
Publicity and Publications	-	-	1,608	-	-	-	1,608
Professional Services	-	-	9,796	-	-	-	9,796
IT Professional Services	-	-	20,832	-	-	-	20,832
Attorney General	-	-	58,481	-	-	-	58,481
Employee Recruitment and Develop	-	-	339	-	-	-	339
Dues and Subscriptions	-	-	419	-	-	-	419
Facilities Rental and Taxes	-	-	11,153	-	-	-	11,153
Facilities Maintenance	-	-	198	-	-	-	198

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2023-25 Biennium

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Essential and Policy Package Fiscal Impact Summary - BPR013

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
Services & Supplies							
Agency Program Related S and S	-	-	39,585	-	-	-	39,585
Other Services and Supplies	-	-	172	-	-	-	172
Expendable Prop 250 - 5000	-	-	1,277	-	-	-	1,277
IT Expendable Property	-	-	6,280	-	-	-	6,280
Total Services & Supplies	-	-	\$559,049	-	-	-	\$559,049
Total Expenditures							
Total Expenditures	-	-	559,049	-	-	-	559,049
Total Expenditures	-	-	\$559,049	-	-	-	\$559,049
Ending Balance							
Ending Balance	-	-	(559,049)	-	-	-	(559,049)
Total Ending Balance	-	-	(\$559,049)	-	-	-	(\$559,049)

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2023-25 Biennium

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Essential and Policy Package Fiscal Impact Summary - BPR013

101 eLicense Replacement System

Package Description

This policy option package reflects the projected costs to acquire software and professional services necessary to replace OREA's aging core business suite software (eLicense). This system is responsible for the agency's end-to-end public facing services, including online license applications, data inquiry and search, and complaint processing. This system also services as the internal platform for application and workflow processing, revenue reconciliation, statistical reporting, education tracking, and compliance, audit, and regulatory case management.

The existing system, eLicense, was acquired and deployed more than ten years ago. OREA has maintained an ongoing partnership with the system developer (Tyler Tech) through hosting and maintenance agreements that provided support and routine updates to ensure security and continuity of systems. While the system continues to deliver the functions of the original contract and allows OREA to operate a paperless, remote office, technology has evolved, as have user expectations and opportunities for business and administrative efficiency.

A modernized system will bring opportunities for reduced processing times and vastly improve the customer service experience, ultimately reducing barriers and creating efficiency in staff production times. Through an updated, mobile-adept user interface, users will operate within the application seamlessly and intuitively, reducing a need for telephone support while in the system. Fulfilling a promise of the Action Plan to Reduce Barriers to Licensure for Immigrants and Refugees from 2019 and the 2021-2023 Diversity, Equity, and Inclusion Plan, the replacement product will allow for translation tools within license applications, public inquiry search, and complaint forms for those with limitations in English fluency. The system will also conform to the current best practices established by the Americans with Disabilities Act (ADA) and OSCIO ensuring website accessibility compliance.

2023-2025 Fiscal Impact

Total Package is \$2,307,803 – Has Fiscal Impact. This project will resource one FTE project manager and up to two million dollars of reserves for software implementation and deployment. This equates to approximately 28% of the OREA's current cash balance. The agency has built this surplus following a 30% licensing fee increase in 2018 established for ensuring restoration funds to replace systems in a timely manner, as well as to ensure solvency in future deficit spending periods. The 2018 fee increase was supported by the Board and industry given the Agency's commitment to maintaining modern business systems which uphold the security of licensee data and ease of use for customers. This package delivers on that expectation, supporting the OREA's values of equity and access.

See project Business Plan in Special Reports section.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 101 - eLicense Replacement System

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
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	212,832	-	-	-	212,832
Empl. Rel. Bd. Assessments	-	-	53	-	-	-	53
Public Employees' Retire Cont	-	-	38,139	-	-	-	38,139
Social Security Taxes	-	-	16,282	-	-	-	16,282
Paid Family Medical Leave Insurance	-	-	851	-	-	-	851
Worker's Comp. Assess. (WCD)	-	-	46	-	-	-	46
Flexible Benefits	-	-	39,600	-	-	-	39,600
Total Personal Services	-	-	\$307,803	-	-	-	\$307,803
Capital Outlay							
Data Processing Software	-	-	2,000,000	-	-	-	2,000,000
Total Capital Outlay	-	-	\$2,000,000	-	-	-	\$2,000,000
Total Expenditures							
Total Expenditures	-	-	2,307,803	-	-	-	2,307,803
Total Expenditures	-	-	\$2,307,803	-	-	-	\$2,307,803
Ending Balance							
Ending Balance	-	-	(2,307,803)	-	-	-	(2,307,803)
Total Ending Balance	-	-	(\$2,307,803)	-	-	-	(\$2,307,803)

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 Essential and Policy Package Fiscal Impact Summary - BPR013

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 101 - eLicense Replacement System

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

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total Positions							
Total Positions							1
Total Positions	-	-	-	-	-	-	1
Total FTE							
Total FTE							1.00
Total FTE	-	-	-	-	-	-	1.00

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 2023-25 Biennium

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 Essential and Policy Package Fiscal Impact Summary - BPR013

Package Description

This policy option package seeks position authority for three FTE: (1) Auditor and (2) Compliance Specialists. The purpose of this package is to meet the public demand and consumer protection need for increased oversight of licensed property management activities. There are more than 10,000 clients' trust accounts registered with the OREA. Each of these accounts are subject to review of property management documentation, accounting records, and bank account reconciliation of monies held by licensees on behalf of owners. These funds are primarily rent-related funds and security deposits, with some licensees holding hundreds of thousands to millions of dollars in trust. Auditing these accounts acts as a prevention screen to reduce the potential of misuse, comingling, and embezzlement. Theft of a security deposit can have a tremendous impact on victims, both owners and tenants. Over the past decade, the agency has investigated several cases that resulted in court-appointed receiverships, and even criminal prosecution, for the most egregious fraud schemes. Through this package, OREA seeks to create barriers to these opportunities and prevent financial harm before it begins to the greatest degree possible with increased compliance and audit activities conducted by a greater number of dedicated staff.

To begin addressing this issue, Commissioner Strode initiated a newly established Compliance & Audits Division in January 2022. The clients' trust account reconciliation review program was formerly housed as a Compliance unit in the Licensing & Education Division. While the program was maintained, the many varied responsibilities across other programs compromised the team's ability to refine practices, scale in volume, and substantially increase production of account reviews. Constraints included available staffing resources and the immediate priorities of licensees in noncompliance-related matters. Commissioner Strode directed a new unit be formed with the singular focus on the review of client funds and other compliance measures to prevent harm. To date, several efficiency measures have been implemented. OREA expects that, under existing resources, it may be possible to review up to a few hundred accounts per year. This is insufficient for the desired impact, as it would require many years to review all firms conducting property management at the current rate. This new division is analyzing the existing clients' trust account review, identifying opportunities to increase the impact of these programs, while simultaneously scaling the effectiveness of Agency actions. The agency seeks to grow this division by adding three addition FTE responsible for reviewing every company holding clients' trust funds on a three-year rotation. OREA believes that this is a realistic goal with increased resources. The agency recognizes that client funds held in trust by licensees is among the greatest threats to consumer protection in Oregon and is compelled to increase dedicated resources to address this risk exposure gap. Upon establishing a new baseline for clients' trust account reviews with greater resources, this team will also be responsible for implementing escrow audits. Escrow-related activity has doubled to over \$90 billion in the past six years, and the agency has observed another high-risk vulnerability.

2023-2025 Fiscal Impact

Total package is \$529,146 – Increasing FTE by three will have a fiscal impact.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
Pkg: 102 - Compliance & Audits Division Staffing

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
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	325,512	-	-	-	325,512
Empl. Rel. Bd. Assessments	-	-	159	-	-	-	159
Public Employees' Retire Cont	-	-	58,332	-	-	-	58,332
Social Security Taxes	-	-	24,903	-	-	-	24,903
Paid Family Medical Leave Insurance	-	-	1,302	-	-	-	1,302
Worker's Comp. Assess. (WCD)	-	-	138	-	-	-	138
Flexible Benefits	-	-	118,800	-	-	-	118,800
Total Personal Services	-	-	\$529,146	-	-	-	\$529,146
Total Expenditures							
Total Expenditures	-	-	529,146	-	-	-	529,146
Total Expenditures	-	-	\$529,146	-	-	-	\$529,146
Ending Balance							
Ending Balance	-	-	(529,146)	-	-	-	(529,146)
Total Ending Balance	-	-	(\$529,146)	-	-	-	(\$529,146)
Total Positions							
Total Positions	-	-	-	-	-	-	3
Total Positions	-	-	-	-	-	-	3

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Essential and Policy Package Fiscal Impact Summary - BPR013

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 102 - Compliance & Audits Division Staffing

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

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total FTE							
Total FTE							3.00
Total FTE	-	-	-	-	-	-	3.00

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 Essential and Policy Package Fiscal Impact Summary - BPR013

Package Description

Historically , OREA has outsourced human resources professional services, partnering with the Oregon Department of Fish & Wildlife for several years, and then our current partners at Department of Administrative Services. However, this package seeks to establish one FTE Human Resources Analyst III to provide agency staff and management with daily human resources and recruitment support, as well as act as the OREA's Affirmative Action and Diversity, Equity, and Inclusion Coordinator.

Following Commissioner Strode's appointment to lead OREA, a critical prioritization has been placed on the importance of Affirmative Action, Diversity, Equity and Inclusion and reducing systemic barriers in our services and within Agency operations. Some of Oregon's most entrenched systemic barriers, deeply affecting communities of color for generations, intersect with the work of the agency. The Commissioner is dedicated to following through on the commitments made in the OREA's Affirmative Action/Diversity, Equity, and Inclusion Plan. To do this work effectively, the agency requires an internal champion with the skills, background, knowledge, and dedicated time resources who operates from within the organization, closely connected to the agency's mission, values, and vision. OREA will be working to foster diversity and inclusion in engagement and reduce barriers to entry.

This role will aid in management's efforts in creating a culture of inclusion by enhancing efforts to retain current employees of color, as well as building a diverse network of potential candidates and establishing a pipeline for recruitments, management succession planning, board representation, and executive leadership. To do this most effectively, this new position will be rooted in Human Resources. Historically, the agency had assigned the coordination of Affirmative Action and Diversity, Equity, and Inclusion efforts to an Executive Assistant to the Commissioner, then shared amongst the management team. The work was not able to be done at a level that met the vision or the need. Further still, the demand has increased to meet the targeted vision of Commissioner Strode. This effort can no longer be led by administrative staff, but must be advocated for at the management table. OREA seeks to firmly address the underserved needs in communication as well as Diversity, Equity, and Inclusion/Affirmative Action. OREA is growing, real estate activity in Oregon has been surging since 2013, and the Agency now licenses the greatest number of individuals in its history. To meet this dramatic increase in activity from the past decade, the agency is requesting four new positions from the legislature to meet its consumer protection mission and the expectations of Oregonians. The growing demands of the agency and staffing, OREA seeks to provide full-time human resources services to staff from within the agency to aid with long-term strategic planning while embodying OREA's mission wholly and represent the agency directly in statewide HR/AA/DEI coordinated efforts.

2023-2025 Fiscal Impact Total package is \$239,266

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 103 - HR/DEI/Communications Staffing

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
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	158,424	-	-	-	158,424
Empl. Rel. Bd. Assessments	-	-	53	-	-	-	53
Public Employees' Retire Cont	-	-	28,390	-	-	-	28,390
Social Security Taxes	-	-	12,119	-	-	-	12,119
Paid Family Medical Leave Insurance	-	-	634	-	-	-	634
Worker's Comp. Assess. (WCD)	-	-	46	-	-	-	46
Flexible Benefits	-	-	39,600	-	-	-	39,600
Total Personal Services	-	-	\$239,266	-	-	-	\$239,266
Total Expenditures							
Total Expenditures	-	-	239,266	-	-	-	239,266
Total Expenditures	-	-	\$239,266	-	-	-	\$239,266
Ending Balance							
Ending Balance	-	-	(239,266)	-	-	-	(239,266)
Total Ending Balance	-	-	(\$239,266)	-	-	-	(\$239,266)
Total Positions							
Total Positions	-	-	-	-	-	-	1
Total Positions	-	-	-	-	-	-	1

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 103 - HR/DEI/Communications Staffing

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

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total FTE							
Total FTE							1.00
Total FTE	-	-	-	-	-	-	1.00

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SPECIAL REPORTS

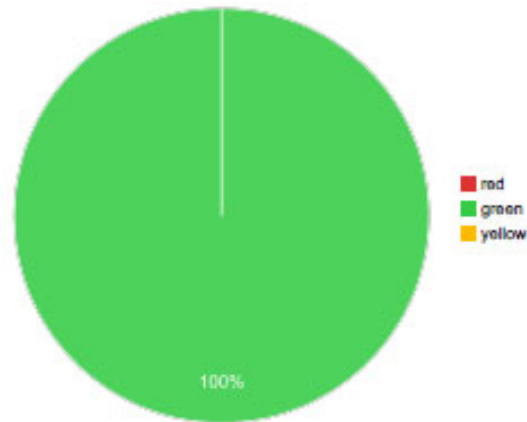
Real Estate Agency

Annual Performance Progress Report

Reporting Year 2023

Published: 9/29/2023 12:10:34 PM

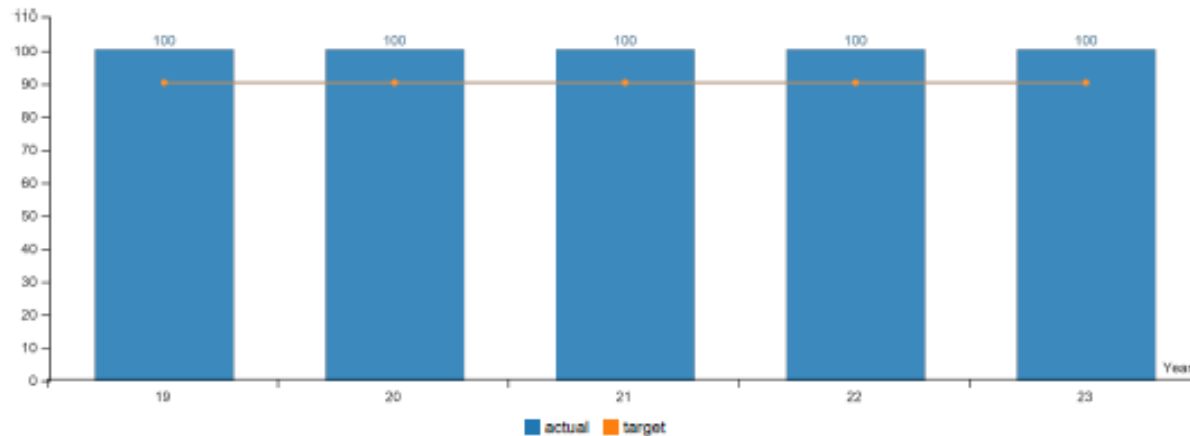
KPM #	Approved Key Performance Measures (KPMs)
1	Compliance Rate Achieved - Percent of property managers/principal brokers reviewed who meet compliance within 45 days of a mail-in compliance review.
2	Percent of Investigations completed within 150 days of receipt of complaint. -
3	Contested Case Actions 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:	100%	0%	0%

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	2019	2020	2021	2022	2023
Compliance Rate Achieved					
Actual	100%	100%	100%	100%	100%
Target	90%	90%	90%	90%	90%

How Are We Doing

The Agency is continuing to exceed the target of property managers and principal brokers meeting compliance within 45 days of a compliance review.

Currently, licensees engage in the compliance review process voluntarily, and utilize the opportunity to have the Agency evaluate their business practices in an educational context, outside of the regulatory process. For participating licensees, the compliance review provides useful feedback to ensure proper application of Agency law and rule. Agency staff review a recent transaction file and outline areas of noncompliance. In cases where a correction can be made, staff follow up with the licensee and allow a 45-day cure period. In all cases in recent years, licensees have met compliance within that period.

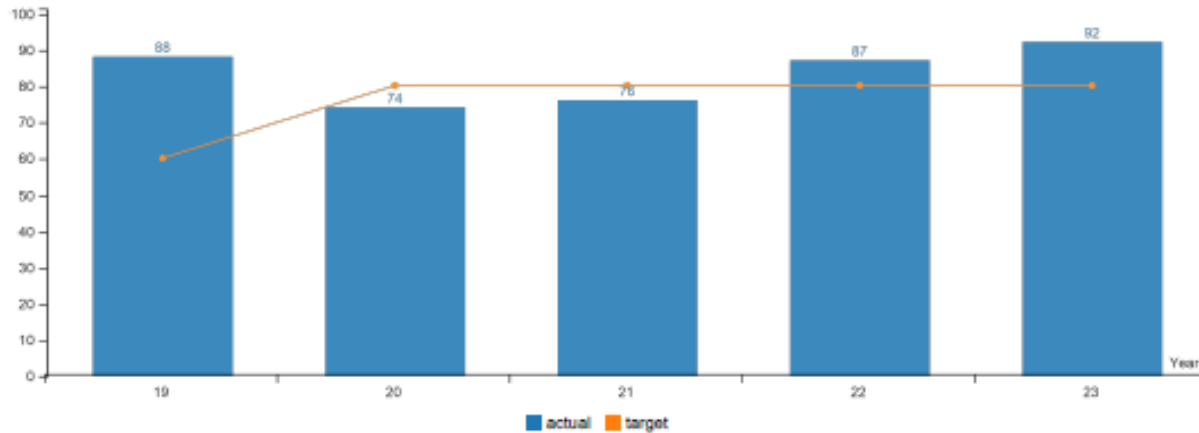
Factors Affecting Results

The KPM has been at 100% since reporting year 2019 and the Agency has determined that the existing process is not providing the value it could. In the upcoming biennium, the Agency intends to redesign this program, making it a compulsory compliance review program. We believe the voluntary nature of the current program does not reach those that would most benefit from the nonregulatory review.

The redesigned review will rank prioritize property manager participation within the first four years of practice, given the elevated risk associated with handling property management related funds and trust account reconciliation. Principal Broker and Broker licensees as well as those with more time in the profession will be given secondary priority for review.

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	2019	2020	2021	2022	2023
Percent of cases investigated within 150 days of receipt of complaint					
Actual	88%	74%	76%	87%	92%
Target	60%	80%	80%	80%	80%

How Are We Doing

Percent of cases completed within 150 days of receipt is currently at 92%, 12% above the 80% goal. Despite the investigative team experiencing the loss of some senior staff in recent years, the group is operating at peak performance and the Agency seeks only to stabilize outcomes to ensure long-term sustainability of current achievements.

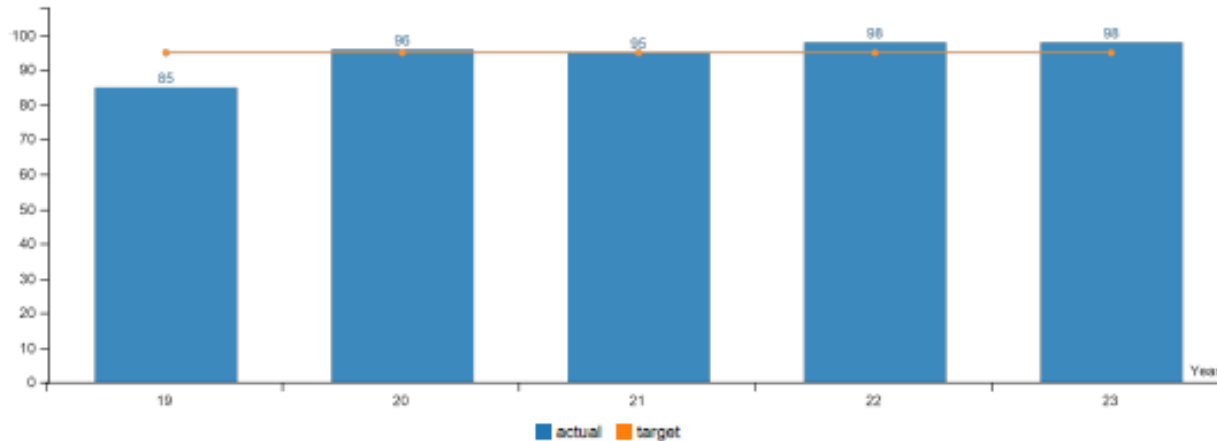
The Agency also plans to retain near full staffing amongst investigators, to the degree possible, as vacancies can have a high impact on this key performance measure.

Factors Affecting Results

This division has adopted a series of process improvements and quality controls over the past two years. New measures include greater transparency with investigative line staff in case duration targets as well as collective team and individual performance indicators. Further the division has implemented strategic case planning sessions with Senior Case Analysts and check points through the life of a case with the investigator, leads and management participating. This continuous feedback model and scope guidance has returned case management results back to above expectations while ensuring quality investigations are completed in a timely manner.

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	2019	2020	2021	2022	2023
Percent of Contested Case Actions Resolved Before a Formal Hearing					
Actual	85%	96%	95%	98%	98%
Target	95%	95%	95%	95%	95%

How Are We Doing

The Agency is above target in the goal to settle 95% of contested case actions with a 98% result in the most recent reporting period.

Factors Affecting Results

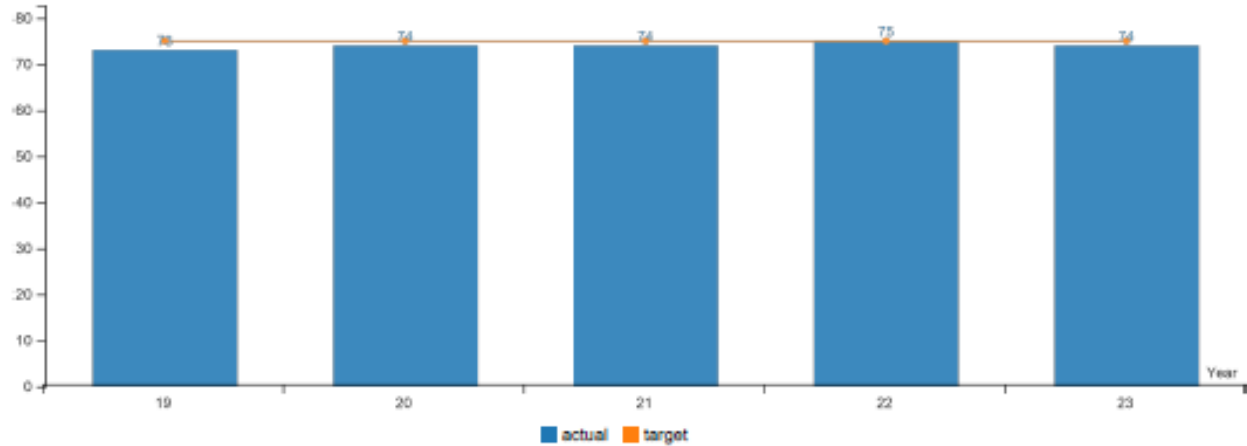
The Agency approaches the disciplinary process with transparency, equity and consumer protection at the forefront. The Agency offers a settlement process for nearly all proposed administrative actions. Respondents are provided with the completed case investigation report and an invitation to participate in a meeting with the Regulation Division to discuss if the case is missing any relevant facts as well as an opportunity to discuss any mitigating circumstances that were not otherwise captured in the report or resolution. Licensees are invited, along with representing counsel if retained, to rebut any information presented in the investigation.

To maintain consistency as well as equity in the sanctioning process, the Agency enters the settlement with a clearly stated position and intent. The respondent has several weeks to prepare. The Agency aims disrupt inequitable outcomes and seeks to provide the most fair and consistent offer from the outset, regardless of legal representation in the process.

All respondents retain the right to refuse the Agency's offer and seek a hearing before an Administrative Law Judge. In such cases this KPM is impacted, when a hearing is held. Though in this period of 43 actions, only one went to hearing.

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	2019	2020	2021	2022	2023
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.					
Actual	73%	74%	74%	75%	74%
Target	75%	75%	75%	75%	75%

How Are We Doing

The Agency is currently 1% below target for KPM #4, percent of licensees who rate the board-administered exam as "good" or "excellent" as an effective screen for competent and ethical professionals.

Factors Affecting Results

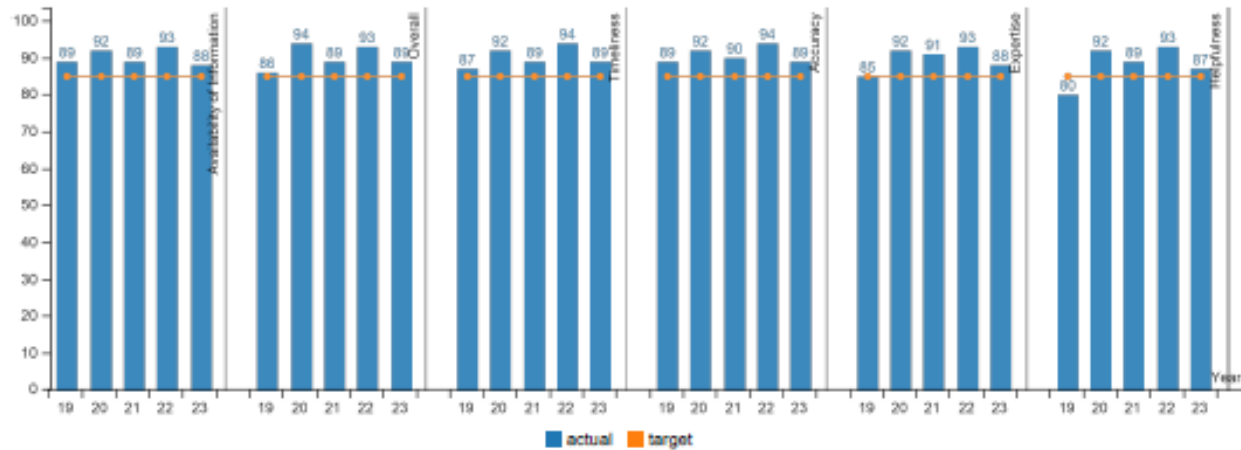
While the Agency is below target for this performance measure, it is within the typical range of -2 to 0% of target. The same feedback persists as has been provided to the Agency for the last several years. In real estate, most licensees view competency being closely tied to performance in the industry (sales) and familiarity with professional practices, that are managed by the brokerage. Pre-licensing exams are not intended to teach sales and marketing. Moreover, "ethics" is often associated with "Code of Ethics" of the Realtor Association, whereas Oregon statute only refers to "duties and responsibilities" of a licensee.

Despite having conducted a thorough exam update with a robust work group in October 2020, comprised of seasoned real estate licensees and professional psychometricians, there was no statistically significant change in the performance of this KPM.

The Agency will continue to closely monitor the comments associated with this KPM to determine if new actionable feedback is given.

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	2019	2020	2021	2022	2023
Availability of Information					
Actual	89%	92%	89%	93%	88%
Target	85%	85%	85%	85%	85%
Overall					
Actual	86%	94%	89%	93%	89%
Target	85%	85%	85%	85%	85%
Timeliness					
Actual	87%	92%	89%	94%	89%
Target	85%	85%	85%	85%	85%
Accuracy					
Actual	89%	92%	90%	94%	89%
Target	85%	85%	85%	85%	85%
Expertise					
Actual	85%	92%	91%	93%	88%
Target	85%	85%	85%	85%	85%
Helpfulness					
Actual	80%	92%	89%	93%	87%
Target	85%	85%	85%	85%	85%

Overall performance is down from the previous reporting period from 93% to 89%. While this remains above target for the reporting period, it is a concern that the number has decreased by 4% over the last year.

Factors Affecting Results

The Agency strives to provide excellent customer service to licensees and the public. All applications are available through the Agency's eLicense system and conducted online. License applications are processed through automated workflows, based on business rules, in real time as requirements are met and do not require staff intervention outside of the background review. Business applications are completed within three business days.

Most recent statistics show that the Agency handles upwards of 2,000 phone calls per month with an average hold time under one minute. Licensing staff are available by phone from 8am -5pm, Monday through Friday, and the Agency has a fulltime in office Receptionist trained to answer licensing questions and assist individuals in person, at the Agency office in Salem, Oregon. Agency email is responded to within a 24 hour period. The Agency responds to roughly 3,000 emails on average per month. Comments from the customer service survey are monitored on a monthly basis and are overwhelmingly positive in regards to staff performance in assisting customers. However, negative comments regarding the online processes have increased over time. Customers are dissatisfied with an aging system that doesn't operate as efficiently as expected.

The Agency has officially kicked off the eLicense Replacement System Project and has been granted funding in Policy Option Package 101 in the 2023-2025 Budget. The Agency will follow through on our commitment to outstanding customer service and provide an updated technical platform that is intuitive to users, reduces the need for customer service support and shortens processing times for applications and complaints. The Agency intends to launch a new system in 2025.



Oregon

Kate Brown, Governor

Real Estate Agency
530 Center St. NE, Suite 100
Salem, Oregon 97301-2505
Phone: (503) 378-4170
www.oregon.gov/rea

January 28, 2022

Frank Garcia, Director-Diversity & Inclusion
Office of Governor Kate Brown
frank.garcia@oregon.gov

RE: 2021-2023 Affirmative Action/Diversity, Equity & Inclusion Plan

The Oregon Real Estate Agency (OREA) is pleased to submit our 2021-2023 Affirmative Action/Diversity, Equity & Inclusion Plan.

OREA's mission is to provide quality protection for Oregon consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy market atmosphere. As a part of this mission, we are building an inclusive and diverse Agency, reflective of the Oregonians we serve.

OREA is committed to diversity and continuing our efforts of creating and maintaining a workforce that parallels the diverse population of Oregon. In doing so, it is imperative that OREA provides a work environment that is positive, respectful, safe, and free from harassment and discrimination of any kind. In addition, we are committed to integrating diversity and inclusion into how we conduct business in order to better serve the diverse citizens of Oregon.

Enclosed please find the updated Oregon Real Estate Agency Affirmative Action/Diversity, Equity and Inclusion Plan for the 2021-2023 Biennium for your review and consideration.

If you have any questions or need additional information, please contact Leandra Borstelman, Affirmative Action Officer at 971-719-3316.

Steve Strode
Real Estate Commissioner

c: Leandra Borstelman, Affirmative Action Officer
Anna Higley, Deputy Commissioner
Rebecca Avila, Client Agency HR Manager

Agency Diversity, Equity & Inclusion Statement

The Oregon Real Estate Agency strives to develop and maintain a diverse and inclusive organizational culture that is representative of the population we serve, all Oregonians. Our office ensures that all with whom we engage are treated fairly and equally, regardless of gender, age, race, national origin, color, ethnicity, religion, disability, sexual orientation, veteran status, etc.

As our work impacts all Oregonians, and we work with many agencies within state government, the Oregon legislature, professional and industry organizations, licensees, and the public. Systemic barriers may impose obstacles to developing our goals. OREA is responsible for identifying and implementing effective solutions that will overcome these impediments and improve the performance and service delivery of our agency, meeting the needs of all.

We use the concepts of Diversity & Inclusion, e.g., problem-solving, innovation, and organizational development, to create a workplace that is stronger, better functioning, and more dynamic – and can deliver the best possible service to our employees and customers.

Training, Education, and Development Plan (TEDP)

Employees

New OREA employees meet with the Human Resources Analyst for the agency. They review statewide and agency policies, including the following:

- ADA and Reasonable Accommodation in Employment (*Applies to all employees;*
- Discrimination and Harassment Free (*Applies to all employees;*) and
- Violence-Free Workplace (*Applies to all employees, except where in conflict with CBA, including temporary employees and volunteers*).

The Affirmative Action/Diversity, Equity, & Inclusion Plan is posted on OREA's website. This plan is to be reviewed by staff, at the direction of their manager, or during onboarding.

Volunteers

OREA does not need, nor offer opportunities for, volunteers.

Contractors/Vendors

OREA will provide vendors with a link to the DEI/AA plan by the Designated Procurement Officer at contract signing. Contractors are expected to comply with all state and federal civil rights laws and in the spirit of the plan.

Programs/Internship

Prior to the COVID-19 pandemic, OREA maintained a long-established student worker program. One to four high-school and college students were employed in temporary roles, performing entry level administrative support on limited projects. This included data entry, scanning documents, and other directive clerical work. This program sought to offer young people access and exposure to a professional setting in state government, as well as establish opportunities for mentoring and referrals for future endeavors.

Historically, these opportunities were offered to young people known to existing employees through family or community relationships.

OREA intends to reintroduce this program in the summer of 2023. The agency will be advertising future opportunities to students in the community more broadly, focusing our recruitment efforts on providing opportunities to youth that may not otherwise have experience or an opportunity operating in a professional office environment. OREA intends to partner with the Boys & Girls Club of Salem, and Marion and Polk Counties, as well as area high schools and Chemeketa Community College, to promote this program.

Mentorship Program(s)

Through the statewide performance and accountability framework, managers are in ongoing discussions with staff regarding future goals and professional development. Managers review current performance and offer considered advice to employees regarding opportunities for improvement within their existing roles, as well as internal and external paths to advancement. Managers explore an expanse of training programs that align with the agency's business needs and employees' goals. Managers also leverage their own knowledge and relationships outside of the agency to support the developmental objectives of staff. Human Resources provides regular presentations on Workday, demonstrating how staff may explore career opportunities and training. Human Resources also make themselves available to staff for individualized discussion on advancement statewide.

All OREA employees are engaged in coaching opportunities related to their current and prospective roles and in soft skill development by engaging with peers and the licensed community.

Community Outreach Program(s)

Commissioner Strode participates at the Oregon Realtors Diversity Committee, Business Issues Key Committee, and the newly established Oregon chapter of National Association of Real Estate Brokers (an equal opportunity and civil rights advocacy organization for Black American real estate professionals, consumers, and communities).

OREA also takes frequent opportunities to collaborate with other industry partners through speaking engagements, policy discussions, workgroups, and research in an effort to support community outreach programs related to real estate and the promotion of an equitable professional service delivery.

OREA's Affirmative Action/Diversity, Equity, & Inclusion Representative regularly attends the Oregon Diversity & Inclusion/Affirmative Action/ Equal Employment Opportunity (DI/AA/EEO) meetings, actively participating and seeking opportunities for the agency to contribute to Oregon's greater efforts.

Diversity Awareness Program(s)

- 17 of 29 FTE attended the 2021 State of Oregon Diversity and Inclusion Conference as it was held virtually.

- Two employees attended the 2021 Annual Tribal-State Government Summit.
- 30% of OREA staff, and all management staff, have taken the Creating a Transgender Inclusive Workplace training through Workday.
- February 16, 2022: All Staff Training -*The Ghosts of our Past: A History of Housing Displacement, Discrimination, and Segregation in Oregon*

The Commissioner's office meets monthly to identify opportunities to promote diversity awareness within the Agency. Presentations for staff on diversity awareness will be added continually.

Leadership Development/Training Program(s)

All new managers and staff in lead work positions attend the statewide Emerging Managers training program hosted by the Department of Administrative Services. This program is designed to develop management skills necessary in state government leadership, as well as provides an opportunity for managers to develop a peer network outside of the agency. OREA also supports managers seeking a certificate in public management from Willamette University and promotes participation in a cohort of Leadership Oregon.

Executive Order 16-09 Updates

Respectful Leadership Training (Diversity, Equity & Inclusion)

All management employees are required to take the Transgender Inclusive Workplace series and attend the Annual Governor's Diversity Conference. These educational events are promoted to staff but are not mandatory.

OREA attends the Tribal Nations Summit annually to stay informed on key issues, initiatives, and goals of Oregon Tribes and continually considers those priorities as the agency reviews new rules, policies, and regulations.

The Affirmative Action/Diversity, Equity, & Inclusion Representative attends all State of Oregon and Governor-sponsored Diversity & Inclusion/Affirmative Action representative meetings, trainings, and workshops, sharing materials and recommendations with OREA management. The agency will continue to review opportunities for respectful leadership training directly to management at the monthly DEI/AA meeting.

Exit Interview Survey

OREA encourages employees leaving the Agency to participate in the Employee Exit Interview through Workday to elicit employee feedback on the work environment and issues that could hinder diversity recruiting and retention efforts. Employees receive a link to the survey through Workday to complete prior to their last day.

Human Resources shares the survey results with managers when appropriate or if the results and/or trends require immediate action.

Performance Evaluations of all Management Personnel

All managers receive quarterly check-ins and annual reviews. In accordance with ORS 659A.012, the effectiveness in achieving Affirmative Action objectives is a required component in the evaluation of performance by managers and supervisors and that specific examples of a manager's or supervisor's Affirmative Action and diversity successes and achievements should be clearly described. This is something OREA is incorporating into management performance evaluations as an internal performance measure. As management position descriptions are updated, language relating to Affirmative Action, diversity, equity, and inclusion will be incorporated.

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

The Agency has a limited budget for new contract awards in the 2021-2023 biennium. However, when a need arises for new contracts for services and supplies, the OREA Designated Procurement Officer will resource with businesses identified by the Certification Office for Business Inclusion and Diversity (COBID) as a Minority and/or Women Business Enterprise.

Agency total contract budget (dollars)	\$194,003.30
Agency total new contracts in current biennium (dollars)	\$1,008.30
Total number of contracts	5
Total number of contracts with COBID firms	1
Total contract dollars spent on COBID contracts	\$1,008.30
Contract Counts by COBID Qualification	1
Minority/Women Business Enterprise	1
Emerging Small Business	0
Service Disabled Veteran	0
Disadvantaged Business Enterprise	0

Roles for Implementation of Plans

The organization currently consists of one executive, four management, one supervisor and 24 professional and administrative staff positions.

Commissioner's Office

The Commissioner sets OREA's policies concerning equal employment opportunity processes, Affirmative Action, and Diversity, Equity, and Inclusion. The Commissioner's Office has overall responsibility for complying with policy and achieving these goals to which the Agency is committed. The Commissioner acts as the agency head and sole agency executive, the Deputy Commissioner provide leadership to agency managers, evaluates the performance of managers to ensure their work performance reviews include Affirmative Action efforts and accomplishments, and initiates action, directly or through an authorized designee, on reported activities contrary to the Agency's policy.

Managers and Supervisors

OREA managers and supervisors are accountable to the Deputy Commissioner for carrying out the Affirmative Action and Diversity, Equity, and Inclusion goals. They are responsible for the following:

- Knowing the Agency's EEO policies and procedures and the Affirmative Action/Diversity, Equity, and Inclusion plan goals.
- Maintaining a work environment that is free from harassment, hostility, and discrimination.
- Making a good faith effort to achieve established goals for their respective work unit.
- Encouraging upward mobility of employees by making opportunities available for career development and training whenever feasible.
- Initiating contact with Human Resources prior to any action taken to investigate discrimination or sexual harassment complaints.
- Ensuring employees are practicing principles of respect and cultural tolerance.
- Maintaining a welcoming environment for employees.

Affirmative Action/DEI Representative

Currently, the Administrative Services Division is assigned the duties of Affirmative Action/Diversity, Equity, & Inclusion Representative and is accountable to the Commissioner for carrying out this plan. However, the 2023-2025 Agency Budget Request seeks to fill this role with a Human Resources Analyst III dedicated to realizing this plan, committing to the further development of this plan in future biennia, and conducting human resources management activities within the agency. A dedicated, experienced professional with a background dedicated to DEI and Affirmative Action efforts will best aid the Agency in realizing these goals. The representative is responsible for the following:

- Disseminating information through training and management consultation.
- Reviewing personnel practices to identify barriers to equal employment and upward mobility opportunities and recommend to management any changes in programs and procedures designed to eliminate discriminatory practices.
- Advising the Commissioner of the preparation of equal employment opportunity programs, procedures, regulations, reports, and the agency plans.
- Monitoring progress toward goals.
- Assuring that Agency recruitments are carried out in compliance with AA and EEO goals and provide assistance to managers with efforts to meet Affirmative Action recruitment goals and outreach efforts.

- Monitoring recruitment processes and evaluate employment policies and practices to ensure there is equal opportunity for protected class individuals.
- Developing or contract training for staff on cultural competency.
- Communicating internal complaint procedure regarding discrimination to all employees and proceeds promptly with fair and unbiased investigations.
- Conducting periodic reviews to ensure that all facilities are accessible to disabled employees and customers.
- Maintaining a welcoming environment for employees by modeling and promoting an environment of respect and sensitivity to
- individuals.
- Attending the Governor’s Office of Diversity & Inclusion/Affirmative Action related trainings and workshops.

July 1, 2019-June 30, 2021 – PROGRESS MADE

Workforce Representation by Job Classification

OREA employees are categorized into three Equal Employment Opportunity tiers– Officials & Managers, Professionals, and Administrative Support. Due to agency’s size, OREA typically has moderate turnover and there are limited hiring opportunities. The agency’s diversity metrics compare favorably to the statewide representation goals and is above parity with women and with people of color.

- 67% of lead workers are women
- 67% of officials & managers are women
- 61% of all employees are women
- 26% of employees are people of color
- 17% of officials & managers have disclosed that they are part of the LGBTQ+ community
- 7% of employees are have disclosed that they are a veterans
- 3% of employees have disclosed that they have a disability

Progress Made or Lost Since Previous Biennium

The comparative data through June 30, 2021, demonstrates regular and sustained improvement from the previous biennium. OREA has increased the representation of people of color among all staff, and we employ a high number of women in all categories.

While successful in establishing greater parity within the overall workforce, the agency prioritizes a further need to promote diversity in management.

July 1, 2021 – June 30, 2023 PROGRESS TOWARD GOALS

Goals for Affirmative Action & Diversity, Equity & Inclusion

OREA will continue to develop and maintain a work environment at the agency that is attractive to a diverse pool of applicants and supports employee retention by being accepting and respectful of employees’ differences, including different cultures, generations, beliefs, and life experiences.

To that effort, the agency has expanded the recruitment process with the goal of encouraging greater diversity in the candidate pool, specifically in leadership positions and at all professional-level recruitments in order to build the management pipeline for internal candidates.

OREA has nurtured relationships with Oregon industry and professional organizations that have a diversity, equity, and inclusion centered missions. Leadership level recruitments will be advertised to those DEI-partner organizations to fill vacant lead and management positions moving forward.

OREA has also updated all recruitments to specifically encourage women and people of color to apply for positions even when they do not meet each of the desired attributes of the role. As it is statistically shown that women and minorities are less likely to apply for a position that has some reach attributes, the agency finds it important to actively solicit those individuals in an attempt to overcome this barrier.

Goal 1: Foster Diversity and Inclusion in Engagement, Reduce Barriers to Entry

Number	Strategy	Owner	Status	Timeline
1.1	<p>Model and demonstrate inclusion</p> <ul style="list-style-type: none"> a. Establish workgroups made up of a diverse group of external partners b. Join Realtor Diversity Committee c. Participation in National Association of Real Estate Brokers whose mission is to strengthen consumer capacity of Black, minority, and emerging target market segments. d. Participation in Real Estate Alliance (LBGTQ+ advocacy in real estate) 	Commissioner's Office	CC	September 2021 - ongoing
1.2	Update license applications to collect demographic licensee data to share with industry partners.	Management Team	IP	February 2022 – June 2023
1.3	<p>Implement services in languages other than English</p> <ul style="list-style-type: none"> a. Dedicate 1-2 positions as Bilingual with pay differential b. Deploy a Spanish language real estate exam 	Management Team Lic. & Ed. Manager	CO IP	July 2021 - June 2023
1.4	Establish a regulatory framework which applies an equity lens	Regs. Manager	IP	July 2022 – June 2023

Goal 2: Increase Representation of Diverse Employees

Number	Strategy	Owner	Status	Timeline
2.1	Increase diversity in recruitment pipeline a. Conduct targeted advertising for recruitments b. Update job posting language to encourage a diverse applicant pool	Management Team	CO	November 2021
2.2	Develop a leadership profile that reflects the State of Oregon workforce.	Commissioner's Office	IP	Ongoing
2.3	Enhance efforts to retain diverse employees	Management Team	CO	Ongoing

OREA has systematically update position descriptions for management staff to include language related to Affirmative Action, diversity, equity, and inclusion. The agency will also incorporate Affirmative Action responsibilities into performance evaluations of management staff.

Strategies for Achieving Goals

OREA will continue reviewing these goals monthly to measure success and prioritize resources to meet these targets. The management team is committed to realizing a more diverse and inclusive workplace while delivering equitable services, free of bias and discrimination. We will engage with our staff and external partners for feedback on these goals, working as partners to achieve this vision and hope to gain the position limitation to onboard a permanent full time Human Resources Analyst to direct and champion these goals into the future.

Real Estate Agency

Summary Cross Reference Listing and Packages
2023-25 Biennium

Agency Number: 91900
BAM Analyst: Michelson, Alicia
Budget Coordinator: Karayel, Caty - (503)370-8528

<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	Vacancy Factor and Non-ORPICS Personal Services	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	070	0	Revenue Shortfalls	Policy Packages
050-00-00-00000	Real Estate Agency	081	0	June 2022 Emergency Board	Policy Packages
050-00-00-00000	Real Estate Agency	090	0	Analyst Adjustments	Policy Packages
050-00-00-00000	Real Estate Agency	091	0	Additional Analyst Adjustments	Policy Packages
050-00-00-00000	Real Estate Agency	092	0	Statewide AG Adjustment	Policy Packages
050-00-00-00000	Real Estate Agency	093	0	Statewide Adjustment DAS Chgs	Policy Packages
050-00-00-00000	Real Estate Agency	801	0	LFO Analyst Adjustments	Policy Packages
050-00-00-00000	Real Estate Agency	802	0	Vacant Position Reductions	Policy Packages
050-00-00-00000	Real Estate Agency	810	0	Statewide Adjustments	Policy Packages
050-00-00-00000	Real Estate Agency	811	0	Budget Reconciliation	Policy Packages
050-00-00-00000	Real Estate Agency	813	0	Policy Bills	Policy Packages
050-00-00-00000	Real Estate Agency	816	0	Capital Construction	Policy Packages
050-00-00-00000	Real Estate Agency	101	0	eLicense Replacement System	Policy Packages
050-00-00-00000	Real Estate Agency	102	0	Compliance & Audits Division Staffing	Policy Packages
050-00-00-00000	Real Estate Agency	103	0	HR/DEI/Communications Staffing	Policy Packages

Real Estate Agency

Policy Package List by Priority
2023-25 Biennium

Agency Number: 91900

BAM Analyst: Michelson, Alicia

Budget Coordinator: Karayel, Caty - (503)370-8528

<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	070	Revenue Shortfalls	050-00-00-00000	Real Estate Agency
	081	June 2022 Emergency Board	050-00-00-00000	Real Estate Agency
	090	Analyst Adjustments	050-00-00-00000	Real Estate Agency
	091	Additional Analyst Adjustments	050-00-00-00000	Real Estate Agency
	092	Statewide AG Adjustment	050-00-00-00000	Real Estate Agency
	093	Statewide Adjustment DAS Chgs	050-00-00-00000	Real Estate Agency
	101	eLicense Replacement System	050-00-00-00000	Real Estate Agency
	102	Compliance & Audits Division Staffing	050-00-00-00000	Real Estate Agency
	103	HR/DEI/Communications Staffing	050-00-00-00000	Real Estate Agency
	801	LFO Analyst Adjustments	050-00-00-00000	Real Estate Agency
	802	Vacant Position Reductions	050-00-00-00000	Real Estate Agency
	810	Statewide Adjustments	050-00-00-00000	Real Estate Agency
	811	Budget Reconciliation	050-00-00-00000	Real Estate Agency
	813	Policy Bills	050-00-00-00000	Real Estate Agency
	816	Capital Construction	050-00-00-00000	Real Estate Agency

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
 2023-25 Biennium
 Real Estate Agency

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

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	2,603,267	3,566,327	3,566,327	6,796,808	6,796,808	6,796,808
REVENUE CATEGORIES						
LICENSES AND FEES						
0205 Business Lic and Fees						
3400 Other Funds Ltd	11,495,871	7,239,990	7,239,990	10,492,779	10,492,779	10,492,779
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	1,786	7,673	7,673	18,938	18,938	18,938
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3400 Other Funds Ltd	229,509	190,689	190,689	426,324	426,324	426,324
8800 General Fund Revenue	57,269	25,500	25,500	64,500	64,500	64,500
All Funds	286,778	216,189	216,189	490,824	490,824	490,824
OTHER						
0975 Other Revenues						
3400 Other Funds Ltd	1,946	5,846	5,846	5,300	5,300	5,300
TRANSFERS IN						
1107 Tsfr From Administrative Svcs						
3400 Other Funds Ltd	15,070	-	-	-	-	-
REVENUE CATEGORIES						
3400 Other Funds Ltd	11,744,182	7,444,198	7,444,198	10,943,341	10,943,341	10,943,341

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
 2023-25 Biennium
 Real Estate Agency

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

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
8800 General Fund Revenue	57,269	25,500	25,500	64,500	64,500	64,500
TOTAL REVENUE CATEGORIES	\$11,801,451	\$7,469,698	\$7,469,698	\$11,007,841	\$11,007,841	\$11,007,841
TRANSFERS OUT						
2060 Transfer to General Fund						
8800 General Fund Revenue	(57,269)	(25,500)	(25,500)	(64,500)	(64,500)	(64,500)
AVAILABLE REVENUES						
3400 Other Funds Ltd	14,347,449	11,010,525	11,010,525	17,740,149	17,740,149	17,740,149
TOTAL AVAILABLE REVENUES	\$14,347,449	\$11,010,525	\$11,010,525	\$17,740,149	\$17,740,149	\$17,740,149
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	3,944,272	4,521,698	4,743,557	5,635,176	5,635,176	5,632,464
3160 Temporary Appointments						
3400 Other Funds Ltd	99,344	16,170	16,170	16,849	16,849	16,849
3170 Overtime Payments						
3400 Other Funds Ltd	1,246	2,990	2,990	3,116	3,116	3,116
3190 All Other Differential						
3400 Other Funds Ltd	60,069	1,665	1,665	1,735	1,735	1,735
SALARIES & WAGES						
3400 Other Funds Ltd	4,104,931	4,542,521	4,764,382	5,656,876	5,656,876	5,654,164
TOTAL SALARIES & WAGES	\$4,104,931	\$4,542,521	\$4,764,382	\$5,656,876	\$5,656,876	\$5,654,164
OTHER PAYROLL EXPENSES						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
2023-25 Biennium
Real Estate Agency

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

<i>Description</i>	<i>2019-21 Actuals</i>	<i>2021-23 Leg Adopted Budget</i>	<i>2021-23 Leg Approved Budget</i>	<i>2023-25 Agency Request Budget</i>	<i>2023-25 Governor's Budget</i>	<i>2023-25 Leg. Adopted Budget</i>
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	1,434	1,682	1,682	1,802	1,802	1,802
3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	662,676	774,257	774,257	1,009,531	1,009,531	1,009,045
3221 Pension Obligation Bond						
3400 Other Funds Ltd	226,908	265,560	265,560	272,499	272,499	272,499
3230 Social Security Taxes						
3400 Other Funds Ltd	311,798	345,061	345,061	428,244	428,244	428,037
3240 Unemployment Assessments						
3400 Other Funds Ltd	2,592	418	418	435	435	435
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	-	-	-	22,060	22,060	22,049
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	1,089	1,334	1,334	1,564	1,564	1,564
3260 Mass Transit Tax						
3400 Other Funds Ltd	24,617	26,528	26,528	31,038	31,038	31,038
3270 Flexible Benefits						
3400 Other Funds Ltd	968,867	1,108,728	1,108,728	1,346,400	1,346,400	1,346,400
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	2,199,981	2,523,568	2,523,568	3,113,573	3,113,573	3,112,869
TOTAL OTHER PAYROLL EXPENSES	\$2,199,981	\$2,523,568	\$2,523,568	\$3,113,573	\$3,113,573	\$3,112,869
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2023-25 Biennium

Real Estate Agency

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
3400 Other Funds Ltd	-	(67,962)	(67,962)	(74,318)	(74,318)	(74,318)
3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	72,951	72,951	-	-	3,416
P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	4,989	4,989	(74,318)	(74,318)	(70,902)
TOTAL P.S. BUDGET ADJUSTMENTS	-	\$4,989	\$4,989	(\$74,318)	(\$74,318)	(\$70,902)
PERSONAL SERVICES						
3400 Other Funds Ltd	6,304,912	7,071,078	7,292,939	8,696,131	8,696,131	8,696,131
TOTAL PERSONAL SERVICES	\$6,304,912	\$7,071,078	\$7,292,939	\$8,696,131	\$8,696,131	\$8,696,131
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	26,946	92,499	92,499	96,384	96,384	96,384
4125 Out of State Travel						
3400 Other Funds Ltd	15,410	10,509	10,509	10,950	10,950	10,950
4150 Employee Training						
3400 Other Funds Ltd	23,332	38,585	38,585	40,206	40,206	40,206
4175 Office Expenses						
3400 Other Funds Ltd	30,644	56,611	56,611	58,989	58,989	58,989
4200 Telecommunications						
3400 Other Funds Ltd	59,546	67,400	67,400	70,231	70,231	70,231
4225 State Gov. Service Charges						
3400 Other Funds Ltd	302,041	336,730	336,730	729,695	657,941	661,687
4250 Data Processing						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
 2023-25 Biennium
 Real Estate Agency

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

<i>Description</i>	<i>2019-21 Actuals</i>	<i>2021-23 Leg Adopted Budget</i>	<i>2021-23 Leg Approved Budget</i>	<i>2023-25 Agency Request Budget</i>	<i>2023-25 Governor's Budget</i>	<i>2023-25 Leg. Adopted Budget</i>
3400 Other Funds Ltd	122,255	113,997	113,997	118,785	118,785	118,785
4275 Publicity and Publications						
3400 Other Funds Ltd	6,090	38,297	38,297	39,905	39,905	39,905
4300 Professional Services						
3400 Other Funds Ltd	60,087	111,321	111,321	121,117	121,117	121,117
4315 IT Professional Services						
3400 Other Funds Ltd	148,681	85,639	236,722	257,554	257,554	257,554
4325 Attorney General						
3400 Other Funds Ltd	203,450	330,963	330,963	389,444	371,452	385,688
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	-	8,081	8,081	8,420	8,420	8,420
4400 Dues and Subscriptions						
3400 Other Funds Ltd	5,782	9,987	9,987	10,406	10,406	10,406
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	241,453	265,559	265,559	276,712	276,712	276,712
4475 Facilities Maintenance						
3400 Other Funds Ltd	8,544	4,713	4,713	4,911	4,911	4,911
4525 Medical Services and Supplies						
3400 Other Funds Ltd	1,278	-	-	-	-	-
4575 Agency Program Related S and S						
3400 Other Funds Ltd	1,013,100	942,499	942,499	982,084	982,084	966,023
4650 Other Services and Supplies						
3400 Other Funds Ltd	171,848	4,097	4,097	4,269	4,269	5,301

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2023-25 Biennium

Real Estate Agency

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	8,055	30,401	30,401	31,678	31,678	31,678
4715 IT Expendable Property						
3400 Other Funds Ltd	82,260	149,523	149,523	155,803	155,803	155,803
SERVICES & SUPPLIES						
3400 Other Funds Ltd	2,530,802	2,697,411	2,848,494	3,407,543	3,317,797	3,300,750
TOTAL SERVICES & SUPPLIES	\$2,530,802	\$2,697,411	\$2,848,494	\$3,407,543	\$3,317,797	\$3,300,750
CAPITAL OUTLAY						
5550 Data Processing Software						
3400 Other Funds Ltd	-	-	-	2,000,000	2,000,000	2,000,000
EXPENDITURES						
3400 Other Funds Ltd	8,835,714	9,768,489	10,141,433	14,103,674	14,013,928	13,996,881
TOTAL EXPENDITURES	\$8,835,714	\$9,768,489	\$10,141,433	\$14,103,674	\$14,013,928	\$13,996,881
ENDING BALANCE						
3400 Other Funds Ltd	5,511,735	1,242,036	869,092	3,636,475	3,726,221	3,743,268
TOTAL ENDING BALANCE	\$5,511,735	\$1,242,036	\$869,092	\$3,636,475	\$3,726,221	\$3,743,268
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	29	29	30	34	34	34
TOTAL AUTHORIZED POSITIONS	29	29	30	34	34	34
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	29.00	29.00	29.75	34.00	34.00	34.00
TOTAL AUTHORIZED FTE	29.00	29.00	29.75	34.00	34.00	34.00

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	2,603,267	3,566,327	3,566,327	6,796,808	6,796,808	6,796,808
REVENUE CATEGORIES						
LICENSES AND FEES						
0205 Business Lic and Fees						
3400 Other Funds Ltd	11,495,871	7,239,990	7,239,990	10,492,779	10,492,779	10,492,779
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	1,786	7,673	7,673	18,938	18,938	18,938
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3400 Other Funds Ltd	229,509	190,689	190,689	426,324	426,324	426,324
8800 General Fund Revenue	57,269	25,500	25,500	64,500	64,500	64,500
All Funds	286,778	216,189	216,189	490,824	490,824	490,824
OTHER						
0975 Other Revenues						
3400 Other Funds Ltd	1,946	5,846	5,846	5,300	5,300	5,300
TRANSFERS IN						
1107 Tsfr From Administrative Svcs						
3400 Other Funds Ltd	15,070	-	-	-	-	-
REVENUE CATEGORIES						
3400 Other Funds Ltd	11,744,182	7,444,198	7,444,198	10,943,341	10,943,341	10,943,341

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
8800 General Fund Revenue	57,289	25,500	25,500	64,500	64,500	64,500
TOTAL REVENUE CATEGORIES	\$11,801,451	\$7,469,698	\$7,469,698	\$11,007,841	\$11,007,841	\$11,007,841
TRANSFERS OUT						
2060 Transfer to General Fund						
8800 General Fund Revenue	(57,289)	(25,500)	(25,500)	(64,500)	(64,500)	(64,500)
AVAILABLE REVENUES						
3400 Other Funds Ltd	14,347,449	11,010,525	11,010,525	17,740,149	17,740,149	17,740,149
TOTAL AVAILABLE REVENUES	\$14,347,449	\$11,010,525	\$11,010,525	\$17,740,149	\$17,740,149	\$17,740,149
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	3,944,272	4,521,698	4,743,557	5,635,176	5,635,176	5,632,464
3160 Temporary Appointments						
3400 Other Funds Ltd	99,344	16,170	16,170	16,849	16,849	16,849
3170 Overtime Payments						
3400 Other Funds Ltd	1,246	2,990	2,990	3,116	3,116	3,116
3190 All Other Differential						
3400 Other Funds Ltd	60,069	1,665	1,665	1,735	1,735	1,735
SALARIES & WAGES						
3400 Other Funds Ltd	4,104,931	4,542,521	4,764,382	5,656,876	5,656,876	5,654,164
TOTAL SALARIES & WAGES	\$4,104,931	\$4,542,521	\$4,764,382	\$5,656,876	\$5,656,876	\$5,654,164
OTHER PAYROLL EXPENSES						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2023-25 Biennium

Real Estate Agency

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	1,434	1,682	1,682	1,802	1,802	1,802
3220 Public Employees' Retire Cont						
3400 Other Funds Ltd	662,676	774,257	774,257	1,009,531	1,009,531	1,009,045
3221 Pension Obligation Bond						
3400 Other Funds Ltd	226,908	265,560	265,560	272,499	272,499	272,499
3230 Social Security Taxes						
3400 Other Funds Ltd	311,798	345,061	345,061	428,244	428,244	428,037
3240 Unemployment Assessments						
3400 Other Funds Ltd	2,592	418	418	435	435	435
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	-	-	-	22,060	22,060	22,049
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	1,089	1,334	1,334	1,564	1,564	1,564
3260 Mass Transit Tax						
3400 Other Funds Ltd	24,617	26,528	26,528	31,038	31,038	31,038
3270 Flexible Benefits						
3400 Other Funds Ltd	968,867	1,108,728	1,108,728	1,346,400	1,346,400	1,346,400
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	2,199,981	2,523,568	2,523,568	3,113,573	3,113,573	3,112,869
TOTAL OTHER PAYROLL EXPENSES	\$2,199,981	\$2,523,568	\$2,523,568	\$3,113,573	\$3,113,573	\$3,112,869
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2023-25 Biennium

Real Estate Agency

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
3400 Other Funds Ltd	-	(67,962)	(67,962)	(74,318)	(74,318)	(74,318)
3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	72,951	72,951	-	-	3,416
P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	4,989	4,989	(74,318)	(74,318)	(70,902)
TOTAL P.S. BUDGET ADJUSTMENTS	-	\$4,989	\$4,989	(\$74,318)	(\$74,318)	(\$70,902)
PERSONAL SERVICES						
3400 Other Funds Ltd	6,304,912	7,071,078	7,292,939	8,696,131	8,696,131	8,696,131
TOTAL PERSONAL SERVICES	\$6,304,912	\$7,071,078	\$7,292,939	\$8,696,131	\$8,696,131	\$8,696,131
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	26,946	92,499	92,499	96,384	96,384	96,384
4125 Out of State Travel						
3400 Other Funds Ltd	15,410	10,509	10,509	10,950	10,950	10,950
4150 Employee Training						
3400 Other Funds Ltd	23,332	38,585	38,585	40,206	40,206	40,206
4175 Office Expenses						
3400 Other Funds Ltd	30,644	56,811	56,811	58,989	58,989	58,989
4200 Telecommunications						
3400 Other Funds Ltd	59,546	67,400	67,400	70,231	70,231	70,231
4225 State Gov. Service Charges						
3400 Other Funds Ltd	302,041	336,730	336,730	729,695	657,941	661,687
4250 Data Processing						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2023-25 Biennium

Real Estate Agency

<i>Description</i>	<i>2019-21 Actuals</i>	<i>2021-23 Leg Adopted Budget</i>	<i>2021-23 Leg Approved Budget</i>	<i>2023-25 Agency Request Budget</i>	<i>2023-25 Governor's Budget</i>	<i>2023-25 Leg. Adopted Budget</i>
3400 Other Funds Ltd	122,255	113,997	113,997	118,785	118,785	118,785
4275 Publicity and Publications						
3400 Other Funds Ltd	6,090	38,297	38,297	39,905	39,905	39,905
4300 Professional Services						
3400 Other Funds Ltd	60,087	111,321	111,321	121,117	121,117	121,117
4315 IT Professional Services						
3400 Other Funds Ltd	148,681	85,639	236,722	257,554	257,554	257,554
4325 Attorney General						
3400 Other Funds Ltd	203,450	330,963	330,963	389,444	371,452	365,688
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	-	8,081	8,081	8,420	8,420	8,420
4400 Dues and Subscriptions						
3400 Other Funds Ltd	5,782	9,987	9,987	10,406	10,406	10,406
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	241,453	265,559	265,559	276,712	276,712	276,712
4475 Facilities Maintenance						
3400 Other Funds Ltd	8,544	4,713	4,713	4,911	4,911	4,911
4525 Medical Services and Supplies						
3400 Other Funds Ltd	1,278	-	-	-	-	-
4575 Agency Program Related S and S						
3400 Other Funds Ltd	1,013,100	942,499	942,499	982,084	982,084	966,023
4650 Other Services and Supplies						
3400 Other Funds Ltd	171,848	4,097	4,097	4,269	4,269	5,301

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
 2023-25 Biennium
 Real Estate Agency

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

Description	2019-21 Actuals	2021-23 Leg Adopted Budget	2021-23 Leg Approved Budget	2023-25 Agency Request Budget	2023-25 Governor's Budget	2023-25 Leg. Adopted Budget
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	8,055	30,401	30,401	31,678	31,678	31,678
4715 IT Expendable Property						
3400 Other Funds Ltd	82,280	149,523	149,523	155,803	155,803	155,803
SERVICES & SUPPLIES						
3400 Other Funds Ltd	2,530,802	2,697,411	2,848,494	3,407,543	3,317,797	3,300,750
TOTAL SERVICES & SUPPLIES	\$2,530,802	\$2,697,411	\$2,848,494	\$3,407,543	\$3,317,797	\$3,300,750
CAPITAL OUTLAY						
5550 Data Processing Software						
3400 Other Funds Ltd	-	-	-	2,000,000	2,000,000	2,000,000
EXPENDITURES						
3400 Other Funds Ltd	8,835,714	9,768,489	10,141,433	14,103,674	14,013,928	13,996,881
TOTAL EXPENDITURES	\$8,835,714	\$9,768,489	\$10,141,433	\$14,103,674	\$14,013,928	\$13,996,881
ENDING BALANCE						
3400 Other Funds Ltd	5,511,735	1,242,036	869,092	3,636,475	3,726,221	3,743,268
TOTAL ENDING BALANCE	\$5,511,735	\$1,242,036	\$869,092	\$3,636,475	\$3,726,221	\$3,743,268
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	29	29	30	34	34	34
TOTAL AUTHORIZED POSITIONS	29	29	30	34	34	34
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	29.00	29.00	29.75	34.00	34.00	34.00
TOTAL AUTHORIZED FTE	29.00	29.00	29.75	34.00	34.00	34.00

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail

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

2023-25 Biennium

Real Estate Agency

Description	Governor's Budget (Y-01) 2023-25 Base Budget	Leg. Adopted Budget (Z-01) 2023-25 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
BEGINNING BALANCE				
0025 Beginning Balance				
3400 Other Funds Ltd	6,796,808	6,796,808	0	-
REVENUE CATEGORIES				
LICENSES AND FEES				
0205 Business Lic and Fees				
3400 Other Funds Ltd	10,492,779	10,492,779	0	-
CHARGES FOR SERVICES				
0410 Charges for Services				
3400 Other Funds Ltd	18,938	18,938	0	-
FINES, RENTS AND ROYALTIES				
0505 Fines and Forfeitures				
3400 Other Funds Ltd	426,324	426,324	0	-
8800 General Fund Revenue	64,500	64,500	0	-
All Funds	490,824	490,824	0	-
OTHER				
0975 Other Revenues				
3400 Other Funds Ltd	5,300	5,300	0	-
TOTAL REVENUES				
3400 Other Funds Ltd	10,943,341	10,943,341	0	-
8800 General Fund Revenue	64,500	64,500	0	-
TOTAL REVENUES	\$11,007,841	\$11,007,841	0	-
TRANSFERS OUT				
2060 Transfer to General Fund				

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ANA100A - Version / Column Comparison Report - Detail

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ANA100A

Description	Governor's Budget (Y-01) 2023-25 Base Budget	Leg. Adopted Budget (Z-01) 2023-25 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8800 General Fund Revenue	(64,500)	(64,500)	0	-
AVAILABLE REVENUES				
3400 Other Funds Ltd	17,740,149	17,740,149	0	-
EXPENDITURES				
PERSONAL SERVICES				
SALARIES & WAGES				
3110 Class/Unclass Sal. and Per Diem				
3400 Other Funds Ltd	4,938,408	4,935,696	(2,712)	-0.05%
3160 Temporary Appointments				
3400 Other Funds Ltd	16,170	16,170	0	-
3170 Overtime Payments				
3400 Other Funds Ltd	2,990	2,990	0	-
3190 All Other Differential				
3400 Other Funds Ltd	1,665	1,665	0	-
TOTAL SALARIES & WAGES				
3400 Other Funds Ltd	4,959,233	4,956,521	(2,712)	-0.05%
OTHER PAYROLL EXPENSES				
3210 Empl. Rel. Bd. Assessments				
3400 Other Funds Ltd	1,537	1,537	0	-
3220 Public Employees' Retire Cont				
3400 Other Funds Ltd	884,634	884,148	(486)	-0.05%
3221 Pension Obligation Bond				
3400 Other Funds Ltd	265,560	265,560	0	-
3230 Social Security Taxes				

Description	Governor's Budget (Y-01) 2023-25 Base Budget	Leg. Adopted Budget (Z-01) 2023-25 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	374,873	374,666	(207)	-0.06%
3240 Unemployment Assessments				
3400 Other Funds Ltd	418	418	0	-
3241 Paid Family Medical Leave Insurance				
3400 Other Funds Ltd	19,272	19,261	(11)	-0.06%
3250 Worker's Comp. Assess. (WCD)				
3400 Other Funds Ltd	1,334	1,334	0	-
3260 Mass Transit Tax				
3400 Other Funds Ltd	26,528	26,528	0	-
3270 Flexible Benefits				
3400 Other Funds Ltd	1,148,400	1,148,400	0	-
TOTAL OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	2,722,556	2,721,852	(704)	-0.03%
P.S. BUDGET ADJUSTMENTS				
3455 Vacancy Savings				
3400 Other Funds Ltd	(67,962)	(67,962)	0	-
3465 Reconciliation Adjustment				
3400 Other Funds Ltd	-	3,416	3,416	100.00%
TOTAL P.S. BUDGET ADJUSTMENTS				
3400 Other Funds Ltd	(67,962)	(64,546)	3,416	5.03%
TOTAL PERSONAL SERVICES				
3400 Other Funds Ltd	7,613,827	7,613,827	0	-
SERVICES & SUPPLIES				
4100 Instate Travel				

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail

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

2023-25 Biennium

Real Estate Agency

Description	Governor's Budget (Y-01) 2023-25 Base Budget	Leg. Adopted Budget (Z-01) 2023-25 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	92,499	92,499	0	-
4125 Out of State Travel				
3400 Other Funds Ltd	10,509	10,509	0	-
4150 Employee Training				
3400 Other Funds Ltd	38,585	38,585	0	-
4175 Office Expenses				
3400 Other Funds Ltd	56,611	56,611	0	-
4200 Telecommunications				
3400 Other Funds Ltd	67,400	67,400	0	-
4225 State Gov. Service Charges				
3400 Other Funds Ltd	336,730	336,730	0	-
4250 Data Processing				
3400 Other Funds Ltd	113,997	113,997	0	-
4275 Publicity and Publications				
3400 Other Funds Ltd	38,297	38,297	0	-
4300 Professional Services				
3400 Other Funds Ltd	111,321	111,321	0	-
4315 IT Professional Services				
3400 Other Funds Ltd	236,722	236,722	0	-
4325 Attorney General				
3400 Other Funds Ltd	330,963	330,963	0	-
4375 Employee Recruitment and Develop				
3400 Other Funds Ltd	8,081	8,081	0	-
4400 Dues and Subscriptions				

Description	Governor's Budget (Y-01) 2023-25 Base Budget	Leg. Adopted Budget (Z-01) 2023-25 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	9,987	9,987	0	-
4425 Facilities Rental and Taxes				
3400 Other Funds Ltd	265,559	265,559	0	-
4475 Facilities Maintenance				
3400 Other Funds Ltd	4,713	4,713	0	-
4575 Agency Program Related S and S				
3400 Other Funds Ltd	942,499	942,499	0	-
4650 Other Services and Supplies				
3400 Other Funds Ltd	4,097	4,097	0	-
4700 Expendable Prop 250 - 5000				
3400 Other Funds Ltd	30,401	30,401	0	-
4715 IT Expendable Property				
3400 Other Funds Ltd	149,523	149,523	0	-
TOTAL SERVICES & SUPPLIES				
3400 Other Funds Ltd	2,848,494	2,848,494	0	-
TOTAL EXPENDITURES				
3400 Other Funds Ltd	10,462,321	10,462,321	0	-
ENDING BALANCE				
3400 Other Funds Ltd	7,277,828	7,277,828	0	-
AUTHORIZED POSITIONS				
8150 Class/Unclass Positions	29	29	0	-
AUTHORIZED FTE				
8250 Class/Unclass FTE Positions	29.00	29.00	0	-

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3160 Temporary Appointments

3400 Other Funds Ltd 679 679 0 0.00%

3170 Overtime Payments

3400 Other Funds Ltd 126 126 0 0.00%

3190 All Other Differential

3400 Other Funds Ltd 70 70 0 0.00%

SALARIES & WAGES

3400 Other Funds Ltd 875 875 0 0.00%

TOTAL SALARIES & WAGES \$875 \$875 \$0 0.00%

OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd 36 36 0 0.00%

3221 Pension Obligation Bond

3400 Other Funds Ltd 6,939 6,939 0 0.00%

3230 Social Security Taxes

3400 Other Funds Ltd 67 67 0 0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Vacancy Factor and Non-ORPICS Personal Services
 Pkg Group: ESS Pkg Type: 010 Pkg Number: 010

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3240 Unemployment Assessments				
3400 Other Funds Ltd	17	17	0	0.00%
3241 Paid Family Medical Leave Insurance				
3400 Other Funds Ltd	1	1	0	0.00%
3260 Mass Transit Tax				
3400 Other Funds Ltd	4,510	4,510	0	0.00%
OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	11,570	11,570	0	0.00%
TOTAL OTHER PAYROLL EXPENSES	\$11,570	\$11,570	\$0	0.00%
P.S. BUDGET ADJUSTMENTS				
3455 Vacancy Savings				
3400 Other Funds Ltd	(6,356)	(6,356)	0	0.00%
PERSONAL SERVICES				
3400 Other Funds Ltd	6,089	6,089	0	0.00%
TOTAL PERSONAL SERVICES	\$6,089	\$6,089	\$0	0.00%
EXPENDITURES				
3400 Other Funds Ltd	6,089	6,089	0	0.00%
TOTAL EXPENDITURES	\$6,089	\$6,089	\$0	0.00%
ENDING BALANCE				

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Vacancy Factor and Non-ORPICS Personal Services
 Pkg Group: ESS Pkg Type: 010 Pkg Number: 010

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	(6,089)	(6,089)	0	0.00%
TOTAL ENDING BALANCE	(\$6,089)	(\$6,089)	\$0	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Standard Inflation
 Pkg Group: ESS Pkg Type: 030 Pkg Number: 031

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

SERVICES & SUPPLIES

4100 Instate Travel

3400 Other Funds Ltd 3,885 3,885 0 0.00%

4125 Out of State Travel

3400 Other Funds Ltd 441 441 0 0.00%

4150 Employee Training

3400 Other Funds Ltd 1,621 1,621 0 0.00%

4175 Office Expenses

3400 Other Funds Ltd 2,378 2,378 0 0.00%

4200 Telecommunications

3400 Other Funds Ltd 2,831 2,831 0 0.00%

4225 State Gov. Service Charges

3400 Other Funds Ltd 392,965 392,965 0 0.00%

4250 Data Processing

3400 Other Funds Ltd 4,788 4,788 0 0.00%

4275 Publicity and Publications

3400 Other Funds Ltd 1,608 1,608 0 0.00%

4300 Professional Services

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Standard Inflation
 Pkg Group: ESS Pkg Type: 030 Pkg Number: 031

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	9,796	9,796	0	0.00%
4315 IT Professional Services				
3400 Other Funds Ltd	20,832	20,832	0	0.00%
4325 Attorney General				
3400 Other Funds Ltd	58,481	58,481	0	0.00%
4375 Employee Recruitment and Develop				
3400 Other Funds Ltd	339	339	0	0.00%
4400 Dues and Subscriptions				
3400 Other Funds Ltd	419	419	0	0.00%
4425 Facilities Rental and Taxes				
3400 Other Funds Ltd	11,153	11,153	0	0.00%
4475 Facilities Maintenance				
3400 Other Funds Ltd	198	198	0	0.00%
4575 Agency Program Related S and S				
3400 Other Funds Ltd	39,585	39,585	0	0.00%
4650 Other Services and Supplies				
3400 Other Funds Ltd	172	172	0	0.00%
4700 Expendable Prop 250 - 5000				
3400 Other Funds Ltd	1,277	1,277	0	0.00%

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Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail

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

2023-25 Biennium

Package: Standard Inflation

Real Estate Agency

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

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
4715 IT Expendable Property				
3400 Other Funds Ltd	6,280	6,280	0	0.00%
SERVICES & SUPPLIES				
3400 Other Funds Ltd	559,049	559,049	0	0.00%
TOTAL SERVICES & SUPPLIES	\$559,049	\$559,049	\$0	0.00%
EXPENDITURES				
3400 Other Funds Ltd	559,049	559,049	0	0.00%
TOTAL EXPENDITURES	\$559,049	\$559,049	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	(559,049)	(559,049)	0	0.00%
TOTAL ENDING BALANCE	(\$559,049)	(\$559,049)	\$0	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Statewide AG Adjustment
 Pkg Group: POL Pkg Type: 090 Pkg Number: 092

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

SERVICES & SUPPLIES

4325 Attorney General

3400 Other Funds Ltd	(17,992)	-	17,992	100.00%
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SERVICES & SUPPLIES

3400 Other Funds Ltd	(17,992)	-	17,992	100.00%
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TOTAL SERVICES & SUPPLIES	(\$17,992)	-	\$17,992	100.00%
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EXPENDITURES

3400 Other Funds Ltd	(17,992)	-	17,992	100.00%
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TOTAL EXPENDITURES	(\$17,992)	-	\$17,992	100.00%
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ENDING BALANCE

3400 Other Funds Ltd	17,992	-	(17,992)	(100.00%)
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TOTAL ENDING BALANCE	\$17,992	-	(\$17,992)	(100.00%)
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Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Statewide Adjustment DAS Chgs
 Pkg Group: POL Pkg Type: 090 Pkg Number: 093

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

SERVICES & SUPPLIES

4225 State Gov. Service Charges

3400 Other Funds Ltd	(71,754)	-	71,754	100.00%
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SERVICES & SUPPLIES

3400 Other Funds Ltd	(71,754)	-	71,754	100.00%
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TOTAL SERVICES & SUPPLIES	(\$71,754)	-	\$71,754	100.00%
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EXPENDITURES

3400 Other Funds Ltd	(71,754)	-	71,754	100.00%
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TOTAL EXPENDITURES	(\$71,754)	-	\$71,754	100.00%
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ENDING BALANCE

3400 Other Funds Ltd	71,754	-	(71,754)	(100.00%)
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TOTAL ENDING BALANCE	\$71,754	-	(\$71,754)	(100.00%)
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Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	212,832	212,832	0	0.00%
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SALARIES & WAGES

3400 Other Funds Ltd	212,832	212,832	0	0.00%
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TOTAL SALARIES & WAGES	\$212,832	\$212,832	\$0	0.00%
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	53	53	0	0.00%
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	38,139	38,139	0	0.00%
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3230 Social Security Taxes

3400 Other Funds Ltd	16,282	16,282	0	0.00%
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	851	851	0	0.00%
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	46	46	0	0.00%
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Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3270 Flexible Benefits				
3400 Other Funds Ltd	39,600	39,600	0	0.00%
OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	94,971	94,971	0	0.00%
TOTAL OTHER PAYROLL EXPENSES	\$94,971	\$94,971	\$0	0.00%
PERSONAL SERVICES				
3400 Other Funds Ltd	307,803	307,803	0	0.00%
TOTAL PERSONAL SERVICES	\$307,803	\$307,803	\$0	0.00%
CAPITAL OUTLAY				
5550 Data Processing Software				
3400 Other Funds Ltd	2,000,000	2,000,000	0	0.00%
EXPENDITURES				
3400 Other Funds Ltd	2,307,803	2,307,803	0	0.00%
TOTAL EXPENDITURES	\$2,307,803	\$2,307,803	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	(2,307,803)	(2,307,803)	0	0.00%
TOTAL ENDING BALANCE	(\$2,307,803)	(\$2,307,803)	\$0	0.00%
AUTHORIZED POSITIONS				
8150 Class/Unclass Positions	1	1	0	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
2023-25 Biennium
Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
Package: eLicense Replacement System
Pkg Group: POL Pkg Type: POL Pkg Number: 101

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

AUTHORIZED FTE

8250 Class/Unclass FTE Positions	1.00	1.00	0.00	0.00%
----------------------------------	------	------	------	-------

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	325,512	325,512	0	0.00%
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SALARIES & WAGES

3400 Other Funds Ltd	325,512	325,512	0	0.00%
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TOTAL SALARIES & WAGES	\$325,512	\$325,512	\$0	0.00%
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	159	159	0	0.00%
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	58,332	58,332	0	0.00%
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3230 Social Security Taxes

3400 Other Funds Ltd	24,903	24,903	0	0.00%
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	1,302	1,302	0	0.00%
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	138	138	0	0.00%
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Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3270 Flexible Benefits				
3400 Other Funds Ltd	118,800	118,800	0	0.00%
OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	203,634	203,634	0	0.00%
TOTAL OTHER PAYROLL EXPENSES	\$203,634	\$203,634	\$0	0.00%
PERSONAL SERVICES				
3400 Other Funds Ltd	529,146	529,146	0	0.00%
TOTAL PERSONAL SERVICES	\$529,146	\$529,146	\$0	0.00%
EXPENDITURES				
3400 Other Funds Ltd	529,146	529,146	0	0.00%
TOTAL EXPENDITURES	\$529,146	\$529,146	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	(529,146)	(529,146)	0	0.00%
TOTAL ENDING BALANCE	(\$529,146)	(\$529,146)	\$0	0.00%
AUTHORIZED POSITIONS				
8150 Class/Unclass Positions	3	3	0	0.00%
AUTHORIZED FTE				
8250 Class/Unclass FTE Positions	3.00	3.00	0.00	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: HR/DEI/Communications Staffing
 Pkg Group: POL Pkg Type: POL Pkg Number: 103

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	158,424	158,424	0	0.00%
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SALARIES & WAGES

3400 Other Funds Ltd	158,424	158,424	0	0.00%
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TOTAL SALARIES & WAGES	\$158,424	\$158,424	\$0	0.00%
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	53	53	0	0.00%
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	28,390	28,390	0	0.00%
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3230 Social Security Taxes

3400 Other Funds Ltd	12,119	12,119	0	0.00%
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	634	634	0	0.00%
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	46	46	0	0.00%
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Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: HR/DEI/Communications Staffing
 Pkg Group: POL Pkg Type: POL Pkg Number: 103

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3270 Flexible Benefits				
3400 Other Funds Ltd	39,600	39,600	0	0.00%
OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	80,842	80,842	0	0.00%
TOTAL OTHER PAYROLL EXPENSES	\$80,842	\$80,842	\$0	0.00%
PERSONAL SERVICES				
3400 Other Funds Ltd	239,266	239,266	0	0.00%
TOTAL PERSONAL SERVICES	\$239,266	\$239,266	\$0	0.00%
EXPENDITURES				
3400 Other Funds Ltd	239,266	239,266	0	0.00%
TOTAL EXPENDITURES	\$239,266	\$239,266	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	(239,266)	(239,266)	0	0.00%
TOTAL ENDING BALANCE	(\$239,266)	(\$239,266)	\$0	0.00%
AUTHORIZED POSITIONS				
8150 Class/Unclass Positions	1	1	0	0.00%
AUTHORIZED FTE				
8250 Class/Unclass FTE Positions	1.00	1.00	0.00	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2023-25 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Statewide Adjustments
 Pkg Group: POL Pkg Type: LFO Pkg Number: 810

Description	Governor's Budget (Y-01)	Leg. Adopted Budget (Z-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

SERVICES & SUPPLIES

4225 State Gov. Service Charges

3400 Other Funds Ltd - (68,008) (68,008) 100.00%

4325 Attorney General

3400 Other Funds Ltd - (23,756) (23,756) 100.00%

4575 Agency Program Related S and S

3400 Other Funds Ltd - (16,061) (16,061) 100.00%

4650 Other Services and Supplies

3400 Other Funds Ltd - 1,032 1,032 100.00%

SERVICES & SUPPLIES

3400 Other Funds Ltd - (106,793) (106,793) 100.00%

TOTAL SERVICES & SUPPLIES

- **(\$106,793)** **(\$106,793)** **100.00%**

EXPENDITURES

3400 Other Funds Ltd - (106,793) (106,793) 100.00%

TOTAL EXPENDITURES

- **(\$106,793)** **(\$106,793)** **100.00%**

ENDING BALANCE

3400 Other Funds Ltd - 106,793 106,793 100.00%

TOTAL ENDING BALANCE

- **\$106,793** **\$106,793** **100.00%**

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ANA101A - Package Comparison Report - Detail

ANA101A

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PIC100 - Position Budget Report

Real Estate Agency

2023-25 Biennium
Budget Preparation

Cross Reference Number: 91900-000-00-00-00000
Legislatively Adopted Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE								
											GF	LF	OF	FF	AF				
Total Salary											-	-	5,632,464	-	5,632,464				
Total OPE											-	-	2,806,347	-	2,806,347				
Total Personal Services													34	34.00	-	-	8,438,811	-	8,438,811

PIC100 - Position Budget Report

Real Estate Agency

2023-25 Biennium
Budget Preparation

Cross Reference Number: 91900-050-01-00-00000
Legislatively Adopted Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
0000509	AR C0107 AP	ADMINISTRATIVE SPECIALIST 1	17	PF	1	1.00	24	6	3982	SAL	-	-	95,088	-	95,088
										OPE	-	-	84,393	-	84,393
0005002	MEAH Z7588 HF	AGENCY HEAD 8	39X	PF	1	1.00	24	10	15277	SAL	-	-	388,648	-	388,648
										OPE	-	-	130,009	-	130,009
0005003	MESN Z7083 AF	BUSINESS OPERATIONS MANAGER 3	35X	PF	1	1.00	24	10	11802	SAL	-	-	283,248	-	283,248
										OPE	-	-	113,188	-	113,188
0005012	AR C0860 AP	PROGRAM ANALYST 1	23	PF	1	1.00	24	9	8048	SAL	-	-	145,104	-	145,104
										OPE	-	-	77,382	-	77,382
0005013	AR C5248 AP	COMPLIANCE SPECIALIST 3	29	PF	1	1.00	24	3	8048	SAL	-	-	145,104	-	145,104
										OPE	-	-	77,382	-	77,382
0005017	MMS X7085 AP	BUSINESS OPERATIONS MANAGER 1	31X	PF	1	1.00	24	10	9718	SAL	-	-	233,232	-	233,232
										OPE	-	-	100,269	-	100,269
0005021	MMS X7436 AP	Licensing and Permitting Supervisor 2		PF	1	1.00	24	10	8408	SAL	-	-	201,792	-	201,792
										OPE	-	-	92,104	-	92,104
0005024	AR C5248 AP	COMPLIANCE SPECIALIST 3	29	PF	1	1.00	24	10	8449	SAL	-	-	202,776	-	202,776
										OPE	-	-	92,359	-	92,359
0005025	AR C5248 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	5768	SAL	-	-	138,432	-	138,432
										OPE	-	-	75,650	-	75,650
0005026	AR C1482 IP	INFORMATION SYSTEMS SPECIALIST 2	21	PF	1	1.00	24	10	5777	SAL	-	-	138,648	-	138,648
										OPE	-	-	75,707	-	75,707
0005030	AR C5248 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	5768	SAL	-	-	138,432	-	138,432
										OPE	-	-	75,650	-	75,650
0005032	MMS X7144 AP	COMPLIANCE AND REGULATORY MANA	33X	PF	1	1.00	24	8	9718	SAL	-	-	233,232	-	233,232
										OPE	-	-	100,269	-	100,269
0005033	AR C5248 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	5768	SAL	-	-	138,432	-	138,432
										OPE	-	-	75,650	-	75,650
0005039	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	7322	SAL	-	-	175,728	-	175,728
										OPE	-	-	85,335	-	85,335
0005043	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	7322	SAL	-	-	175,728	-	175,728
										OPE	-	-	85,335	-	85,335
0005046	MMN X0883 AP	PROGRAM ANALYST 4	31	PF	1	1.00	24	9	9718	SAL	-	-	233,232	-	233,232

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PIC100 - Position Budget Report

Real Estate Agency

2023-25 Biennium

Cross Reference Number: 91900-050-01-00-00000

Budget Preparation

Legislatively Adopted Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE				
											GF	LF	OF	FF	AF
										OPE	-	-	100,269	-	100,269
0005050	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005051	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005052	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005053	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005060	AR C1216 AP	ACCOUNTANT 1	23	PF	1	1.00	24	10	8345	SAL	-	-	152,280	-	152,280
										OPE	-	-	79,246	-	79,246
0005061	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	7322	SAL	-	-	175,728	-	175,728
										OPE	-	-	85,335	-	85,335
0005067	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	7	8345	SAL	-	-	152,280	-	152,280
										OPE	-	-	79,246	-	79,246
0005069	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	2	3784	SAL	-	-	90,816	-	90,816
										OPE	-	-	63,283	-	63,283
0005095	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005098	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005099	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005101	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005102	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720
										OPE	-	-	55	-	55
0005105	AR C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	3	4155	SAL	-	-	99,720	-	99,720
										OPE	-	-	65,597	-	65,597
0005110	AR C0872 AP	OPERATIONS & POLICY ANALYST 3	30	LF	1	1.00	24	10	8868	SAL	-	-	212,832	-	212,832
										OPE	-	-	94,971	-	94,971

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PIC100 - Position Budget Report

Real Estate Agency

2023-25 Biennium
Budget Preparation

Cross Reference Number: 91900-050-01-00-00000
Legislatively Adopted Budget

Position Number	Classification	Classification Name	Sal Rng	Pos Type	Pos Cnt	FTE	Mos	Step	Rate	SAL/OPE	Salary/OPE					
											GF	LF	OF	FF	AF	
0005115	AR C5248 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	3	4155	SAL	-	-	99,720	-	99,720	
										OPE	-	-	65,597	-	65,597	
0005120	AR C5248 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	3	4155	SAL	-	-	99,720	-	99,720	
										OPE	-	-	65,597	-	65,597	
0005125	MMC X1322 AP	HUMAN RESOURCE ANALYST 3	29	PF	1	1.00	24	3	6601	SAL	-	-	158,424	-	158,424	
										OPE	-	-	80,842	-	80,842	
0005130	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	3	5253	SAL	-	-	126,072	-	126,072	
										OPE	-	-	72,440	-	72,440	
0005904	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	8	5014	SAL	-	-	120,336	-	120,336	
										OPE	-	-	70,950	-	70,950	
0005920	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	9	5253	SAL	-	-	126,072	-	126,072	
										OPE	-	-	72,440	-	72,440	
0005928	AR C5247 AP	COMPLIANCE SPECIALIST 2	25	PF	1	1.00	24	10	6977	SAL	-	-	167,448	-	167,448	
										OPE	-	-	83,186	-	83,186	
0005933	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	4	5501	SAL	-	-	132,024	-	132,024	
										OPE	-	-	73,986	-	73,986	
0005934	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	7322	SAL	-	-	175,728	-	175,728	
										OPE	-	-	85,335	-	85,335	
0005937	AR C1486 IP	INFORMATION SYSTEMS SPECIALIST 6	29	PF	1	1.00	24	10	8585	SAL	-	-	206,040	-	206,040	
										OPE	-	-	93,207	-	93,207	
0005938	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	3	5253	SAL	-	-	126,072	-	126,072	
										OPE	-	-	72,440	-	72,440	
0005950	AR C5248 AP	COMPLIANCE SPECIALIST 3	29	PF	1	1.00	24	5	6659	SAL	-	-	159,816	-	159,816	
										OPE	-	-	81,203	-	81,203	
Total Salary											-	-	5,632,464	-	5,632,464	
Total OPE											-	-	2,806,347	-	2,806,347	
Total Personal Services					34	34.00						-	-	8,438,811	-	8,438,811



Business Case for *eLicense System Replacement* *Project*

**Oregon Real Estate Agency,
Office of the Commissioner**

Date: May 31, 2022
Version: 1.0
Author: Jaden Hurtienne

Authorizing Signatures

The person signing this section is attesting to reviewing and approving the business case as proposed.



Agency Head			
Name	Steve Strobe	Title	Commissioner
Phone	971-301-0822	Email	Steve.strobe@rea.oregon.gov
Signature			Date
<i>Steven Strobe</i>			7/22/2022
Agency Executive Sponsor			
Name	Anna Higley	Title	Deputy Commissioner
Phone	971-719-0348	Email	Anna.higley@rea.oregon.gov
Signature			Date
			6/2/2022
Agency Business Manager			
Name	Mesheal Heyman	Title	Administrative Services Division Manager
Phone	971-719-3544	Email	Mesheal.Lheyman@rea.oregon.gov
Signature			Date
<i>Mesheal L Heyman</i>			6/2/2022
Agency Quality Assurance, Systems Integration and Technical Lead			
Name	Tiffani Miller	Title	Systems Administrator
Phone	971-719-0733	Email	Tiffani.m.miller@rea.oregon.gov
Signature			Date
			6/2/2022
Business Case Author			
Name	Jaden Hurtienne	Title	Project Manager/Business Analyst
Phone	971-719-0501	Email	Jaden.t.hurtienne@rea.oregon.gov
Signature			Date
<i>Jaden T Hurtienne</i>			6/2/2022

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Executive Summary

The Oregon Real Estate Agency (OREA) seeks to replace existing licensing and regulatory software in the 2023-2025 biennium. Originally launched in 2012, with a UX upgrade in 2015, eLicense (by Tyler Technologies) is the principal platform in conducting business with OREA. eLicense serves as the core repository for licensee data, license and business application processing, and audit/case management tracking, with all work being administered in an electronic environment. As this system is now approaching the intended replacement stage in its asset life cycle, it is imperative to execute the replacement work timely and avoid extending the product beyond its optimized use. The Agency is in the planning stages and aims to seize this opportunity to deliver a tool that improves service, meets the expectations of stakeholders, and creates efficiencies wherever possible.

The purpose of this document is to establish the business needs and resources required for development and implementation of a replacement system. This project will be known as the “eLicense Replacement Project.”

OREA’s primary external stakeholders are real estate licensees, who tend to be early adopters and heavy users of technology for business. Their expectation in engaging with the Agency is for a seamless, fluid experience, done with ease from a mobile device and without high-touch customer service support. In 2017, the Oregon State Legislature approved real estate licensing fee increases of 30%. The industry testified in support of the increase with an understanding and expectation it would rebuild the Agency’s reserve funds in time to replace the existing system as planned and maintain a current, user-focused licensing and regulatory software product that serves the stakeholder body and protect Oregon consumers.

The Agency estimates that **the eLicense Replacement Project will be a two-year effort** (Project Close end-of-year 2024) **with costs between 1.5 and 2 million dollars** (other funds limitation).

If granted Enterprise Information Services (EIS) Stage Gate authorization, and funding expenditure limitation by the legislature, the Agency will contract for the **replacement of the existing eLicense system and deploy a modernized solution**. The new system will fulfill the requirements listed in this business case **and align with the following initiatives:**

- [OREA - Strategic Plan Framework 2020-2023](#)
- [EIS - Cloud Forward](#)
- [State of Oregon - Diversity, Equity and Inclusion Action Plan](#)

Failure to act compromises the Agency’s ability to conduct business efficiently, meet the expectations of the industry, and maintain alignment with the Agency’s strategic plan and statewide modernization initiatives listed above.

Overview and Background

The mission of OREA is to *provide quality protection for Oregon consumers of real estate, escrow, and land development services, balanced with a professional environment conducive to a healthy market atmosphere.*

Led by the Oregon Real Estate Commissioner, the Agency accomplishes this work through the administration of professional real estate licenses and regulation under Oregon real estate license law (ORS Chapter 696). Through five primary divisions, Education and Licensing, Compliance and Audits, Regulation, Land Development, and Administration, OREA oversees the activity of 31,000 licensees and business registrants across 90 billion dollars in real estate transactions in the state annually, equivalent to 35% of Oregon's gross domestic product.

To conduct this work effectively with limited resources, the Agency is motivated to take every opportunity to scale technology and utilize automation. Doing so will free up our resources toward analytical duties in compliance and investigation. The Agency made an enormous leap toward this objective with the release of eLicense in 2012. All license applications, renewals, and registrations shifted from paper-based, mailed-in forms to an online user portal with approximately 250,000 web sessions annually, buttressed by business intelligence workflows and automated email communication. This transition resulted in hundreds of thousands of dollars in immediate savings related to mail processing and printing and eliminated the need for three administrative FTE formerly dedicated to printing licenses, opening mail, and processing payments. Efficiencies were not limited to internal resources. Launching eLicense significantly impacted the experience of the external user by substantially reducing the processing time for initial applications from months to only a few days, enabling the immediate, real-time processing of license renewal and organizational change applications. It cannot be overstated how important this effort was for making business with, and within, the Agency more efficient and much more customer-focused.

Now, ten years beyond initial deployment and seven years following the last user-interface upgrade, the current system is approaching its intended legacy retirement. Agency business and front line/end-user staff have identified limitations of the current product and opportunities for increased streamlining and process refinement. We also recognize that external users' expectations have evolved as the ways in which they conduct business has changed significantly in the last ten years. Professionals in the real estate industry are early adopters of technology and conduct their work, such as texting clients, advertising on social media, administering records in transaction management software apps, and finalizing contracts with DocuSign, primarily from mobile devices today. Licensees may need to engage with the licensing system more than once in a two-year renewal cycle and, therefore, expect their interaction with the Agency to be as intuitive as the other tools used in their industry. eLicense is no longer able to meet that demand, and the need for customer service support by the Agency is ever increasing.

Outlined in the 2021-2023 Agency Strategic plan, OREA operates with the core values of Regulatory Effectiveness (Appropriateness & Adaptability to Change), Operational Excellence (Innovation & Stewardship), Service Drive (Customer Service Excellence, Equity, & Transparency), and Professionalism (Accountability & Respect). These guiding principles are brought to every aspect of our charge, but the eLicense Replacement System project will allow the Agency to measurably realize these commitments to our stakeholders, demonstrating value from the investment of their licensing fees.

We operate from a perspective of consumer and licensee impact. A replacement system affords the opportunity to scale our effectiveness in the compliance and regulatory programs as well as customer service. Implementing a system with more sophisticated tools to track and analyze information presents the Agency with greater reach and more precision. We are committed to providing transparency, resources, and assistance in a timely manner with an equitable approach. A mobile-agnostic system with embedded language options supports that commitment by expanding the access that the public has to the Agency while reducing barriers to entry.

Business Problem

Listed below are noted primary concerns expected to be addressed in the eLicense replacement system:

1. Our current eLicense system is 10 years old and lacks many modern features that users and staff expect, such as:
 - Expanded user-managed, opt-in methods of notification, including SMS notifications, multiple email addresses, and calendar applications.
 - Improved interaction with education providers including user-friendly data import and validation.
 - Secure criminal justice information system data import with automated background check processing.
 - Expanded payment options.
 - Intelligent system search.
 - Secure online complaint intake, document upload, and external status tracking.
 - Case workflows and automation.
 - Helpdesk live-chat, email thread tracking, or FAQ chat-assistants.
 - Robust document management.
2. Data input and system navigation is confusing or unintuitive for many users.
 - Over 50% of our help desk calls are for eLicense support, which is often simply walking a user through their entire session, requiring considerable time and mental investment from our help desk and causing potentially degraded customer service.
 - 10% of our calls are for password-related issues.
3. Over half of our users prefer logging in from a mobile device.
 - eLicense does not dynamically adjust for mobile, making it even more difficult to navigate and input data on many user devices.
4. All system applications are exclusively provided in English.
 - Robust language access is desired.
5. eLicense is coming to the end of its originally projected lifecycle and should be replaced with a modern cloud-based solution that aligns to the Enterprise IT Modernization plan.

Project Objective

The Project's objective is to eliminate the pain-points below and improve the compliance, regulation, education, administration, and licensing experience for Oregon real estate licensees, Agency

staff, and the public **by replacing our aging eLicense system**. The eLicense replacement system will be a future-focused solution built around the needs, requests, and expectations of our stakeholders and will **align to both the Enterprise IT Modernization and OREA Strategic plans**.

The purpose of this Business Case is to document the justification for the replacement of the existing real estate licensing system. This document outlines the resources needed for project planning, design, development, testing, and implementation of a new system. This project will be known as the “eLicense Replacement Project.”

Table 1: Pain-Points

Pain-Points for the Current eLicense System	
Item	Description
Document management	<ul style="list-style-type: none"> Document management is antiquated, making it difficult for staff to organize and locate data quickly. Retention policies are difficult to adhere to. It was not originally configured around remote work.
Continued Education (CE) module	<ul style="list-style-type: none"> It requires manual input of all CE information. It lacks automation and integration with external sources.
Case management	<ul style="list-style-type: none"> The case management module is cumbersome and unintuitive. There is no visual representation of case status for Case Participants.
Automation and integration	<ul style="list-style-type: none"> There is no system integration with Continued Education providers. There is no system integration for background check data. There is no automated scheduling reminders or integrations with calendar applications, providing action item due date reminders for staff or supervisors.
Communication capabilities	<ul style="list-style-type: none"> It lacks communication receipt options. It does not allow alternative email options. Currently there can only be one email per contact which can cause problems if email address is incorrect or changes. There are no SMS (text) capabilities.
System information searching	<ul style="list-style-type: none"> It does not have intelligent-search capabilities; relies on left to right exact entry. It does not use context to pull up relevant search results. It requires complete accuracy or search will return nothing, e.g., correct spelling or hyphenation of customer name, business name, and locations.
Dashboards and Reports	<ul style="list-style-type: none"> Vendor support or programming knowledge is typically required to create or modify dashboards and reports. There is no GUI interface for report editing.

Complaint Module	<ul style="list-style-type: none"> It does not have a secure online complaint intake module.
Platform Accessibility	<ul style="list-style-type: none"> It does not dynamically adjust to mobile platforms.
Self-Service features.	<ul style="list-style-type: none"> Password resets can require help-desk if user has incorrect email on record. There is no programable live-chat or FAQ chat assistant.
Payment Module	<ul style="list-style-type: none"> Payment options are limited to credit card and check only. There are no options to save payment information.
Land Development	<ul style="list-style-type: none"> The internal system specific functions are not configured to the work of the Land Development section of our Agency.
System Age	<ul style="list-style-type: none"> The requirements for the original project stated that the system would be upgraded in 10-12 years.
User Experience	<ul style="list-style-type: none"> The data input methods and navigation are unintuitive and burdensome. Users' baseline expectations of a modern system are not being met.
Revenue Recording	<ul style="list-style-type: none"> The recording of revenue from eLicense to the State Accounting system is a manual process.

Solution Requirements

The requirements for the eLicense Replacement Project were established by collecting information from the Project Sponsor, IS Admins, and Agency Staff.

Requirements Type Legend:

- **Condition Coverage:** IT systems often have complex combinations of conditions that affect the actions to be taken.
- **Solution – Functional:** Describes behavior and information the solution will manage. Describes system capabilities, functionality.
- **Solution – Non-Functional:** Describes environmental conditions for solution effectiveness. Describes required qualities the solution must have. Also known as quality or supplemental requirements.
- **Stakeholder:** Describes stakeholder needs, solution integration. Bridge between business requirements and solutions requirements.
- **Transition:** Describes the capabilities the solution must have to facilitate the transition from the current state of the enterprise to a desired future state of the solution, but that will not be needed once that transition is complete.

MoSCoW Legend:

- **Must** – Must be satisfied for project to be considered a success.
- **Should** – High priority and should be included if possible.
- **Could** – Desirable but not considered necessary.

Table 2 - Requirements List

eLicense Replacement - Requirements		
Requirement	Type	MoSCoW
The solution must be available for purchase using a State of Oregon-approved purchasing vehicle.	Condition Coverage	Must
The solution must comply with all State of Oregon system and data security requirements.	Condition Coverage	Must
The solution could be a vendor-managed SaaS/PaaS.	Condition Coverage	Could
The solution must retain or enhance all current system as-is functionality.	Condition Coverage	Must
The vendor should have a proven track record of timely solution updates/patches.	Condition Coverage	Must
The solution must comply with all federal and Oregon-mandated ADA requirements.	Conditional Coverage	Must
The solution must have intelligent search capability of data throughout the system.	Solution - Functional	Must
The solution must contain self-service features.	Solution – Functional	Must
The solution could have live chat or programmable chat assistants to aid customers.	Solution – Functional	Could
The solution must contain an online complaint module.	Solution – Functional	Must
The solution must contain a modern payment module.	Solution – Functional	Must
OREA staff must be able to create or modify dashboards and reports without the need of vendor support.	Solution – Functional	Must
The solution must have reliable hosting and regular maintenance throughout the entire lifecycle.	Solution – Non-Functional	Must
Hosted environment for the solution must provide 24/7 support with 99.99% uptime guarantee.	Solution - Non-Functional	Must
The solution should be able to integrate with Office 365.	Solution - Non-Functional	Should
Staff and Users should be able to complete all Agency-relevant activities without needing to leave the system or log into separate accounts.	Solution - Non-Functional	Should
The solution should not require multiple vendors to fulfill these requirements.	Solution - Non-Functional	Should
Vendor must offer advanced training courses to our staff for solution administration.	Stakeholder	Must
Procedural documentation is needed to define service support and management.	Stakeholder	Must
The solution must align with the political and strategic plans for EIS, OREA, and the State of Oregon.	Stakeholder	Must
A transition plan for agency use must be included in the solution.	Transition	Must
The solution must be installed and fully operational by the end of 2024	Transition	Must

Measurable Business Benefits

The following benefits can be expected from the new system:

Table 3: Measurable Business Benefits

Benefit	Measurement
Reduce technical support needed.	Implementing customer self-service features reduces help desk calls by 50% within 12 months.
Allow customers to submit and track complaints online.	Deploying a customer complaint module.
Reduce system-use time and next-steps confusion for customers.	Deploying the following enhanced features: <ul style="list-style-type: none"> • Modern payment module. • Continuing education module. • Customer communication options. • Integrated scheduling and action-item reminders.
Reduce system-use time and confusion for Agency staff.	Deploying the following enhanced features: <ul style="list-style-type: none"> • Intelligent system search. • Easily modified system functionality, such as dashboards and reports. • Modern case workflow status. • Modern document management.
Provide a more accessible system for mobile hardware users.	Implementing system that dynamically adjusts to mobile hardware.
Comply with EIS Modernization Plan	Implementing a vendor-managed SaaS/PaaS solution.

Assumptions & Constraints

Project Assumptions:

- OREA can support any process or architecture changes that will be required.
- Business resources will be available at the time needed.
- Business case is accepted.
- Project is in alignment with Agency Strategic Plan and drives the vision of the agency.
- Solution will meet the requirements and future-state vision.
- Project will go through EIS Oversight.
- The Legislature grants funding for a solution that can meet all project requirements.
- The solution will be compliant with regulatory audits for IT security.
- Project Manager is staffed for the duration of the project.

Project Constraints:

- Limited staff availability due to already established Agency roles, responsibilities, and workloads.
- The project budget stated in this business case is strict and will need change management approval if an increase is needed.
- The solution needs to be finished by end-of-year 2024.

Alternatives

Listed below are some alternatives to the proposed solution:

Alternative 1 – Do nothing

OREA is a highly skilled and efficient Agency that has made significant improvements in real estate industry regulation and will continue to do so regardless of which tool is being used. Fortunately, due to a forward-thinking mindset during the 2012 project, OREA staff have been able to stretch the lifespan of the current eLicense system longer than the desired 10-12 years.

However, the system is dated and becoming less efficient for the needs of our staff and customers every day. The vendor has stated that they will be dedicating a small team to the continual patching of the system, but, as is common in technology enterprises, most of their resources have moved to the newer, more modern solutions that they offer, with the likely depreciation of the legacy software at some point in the future.

It is very unlikely that we will see any major updates or feature enhancements to our current eLicense system.

Doing nothing will also conflict with the EIS Modernization Plan, our desire to increase user accessibility and inclusion, and stakeholder expectations.

Alternative 2 – Purchase or build multiple solutions to address each pain point.

If a single vendor-managed SaaS/PaaS solution is not approved, it might be possible to purchase or build multiple smaller solutions or modules to address each of the pain points listed in this business case.

It would require significant planning and coordination with staff and vendors to ensure that we could integrate each upgrade into the current system without any conflicts or degradation of current services or processes. The cost for this alternative is unknown.

This alternative plan has not been developed, so it is unknown how many separate solutions would be required, but it would likely feel very disconnected to our staff and customers and unlikely align fully with the EIS Modernization or OREA Strategic plans.

Alternative 3 – Purchase a single vendor solution to address all pain points.

We believe purchasing a single vendor solution to fulfill the project requirements and address all Agency pain points is the optimal approach. This will allow for a single point of contact for

developing and managing the solution, which should enhance the Agency experience for patching, remediations, additions, and feature updates for the solution lifecycle.

Conclusions

Conclusions

Replacing our current 2012 eLicense system with a modern SaaS/PaaS solution will directly address each of the pain points listed in this business case and ensure that OREA is aligned with the strategic initiatives to modernize IT systems throughout the Oregon government.

It is in our best interest to procure, develop, and implement a solution from a single vendor that fulfills each of the project requirements.

We intend to partner with EIS throughout this project. By utilizing their expertise in overseeing the development of IT solutions, we should be able to mitigate many of the typical risks associated with executing projects of this size.

We do not have a specific solution in mind at this time, but our high-level requirements will allow us to begin the early stages of vendor analysis, as well as estimate more accurate costs and timelines. The regulation software landscape has developed significantly over the last decade, and **we are confident that we will implement a solution that meets or exceeds the expectations of our staff and users, especially pertaining to our culture of diversity, inclusion, and accessibility.**

Failure to Act

As written in our "Alternative 1 – Do Nothing" approach, **failing to act on our proposed solution will keep us in a state of significantly reduced performance and accessibility. It will be detrimental to our ability to perform customer service long-term** due to the need to maintain operations on a continually depreciating system at a time where modern expectations are higher than ever.

The toll that working on dated systems takes on our staff is also worth mentioning.

The cost of not modernizing the system at the heart of regulating the real estate industry in Oregon is difficult to put into a dollar figure, but, over time, it will be much higher than the cost of the replacement we are proposing.

Appendixes and References

Checklist

- Complete current state, future state, and gap analysis
- Cost model
- Full alternative analysis (if not included in business case)
- Legislation
- Strategic Plan
- Agency Planning document
- LFO Budget Notes
- Prior POP for project
- Any additional information referenced