

GOVERNOR'S BUDGET

2025-2027

OF OREGON



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. N.E. SUITE 100
SALEM, OR 97301

AGENCY ADDRESS



SIGNATURE

COMMISSIONER

TITLE

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LEGISLATIVE ACTION



LEWIS
AND
CLARK

STATE OF OREGON

THE STAR OF EMPIRE TAKES ITS WAY

SB 5536 A BUDGET REPORT and MEASURE SUMMARY

Carrier: Sen. Hansell

Joint Committee On Ways and Means

Action Date: 05/05/23

Action: Do pass with amendments. (Printed A-Eng.)

Senate Vote

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

Exc: 2 - Hansell, Knopp

House Vote

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

Nays: 1 - Reschke

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

1 of 5

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.

- 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
SUBCOMMITTEE ADJUSTMENTS (from CSL)									
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/DEI/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%.

AGENCY SUMMARY



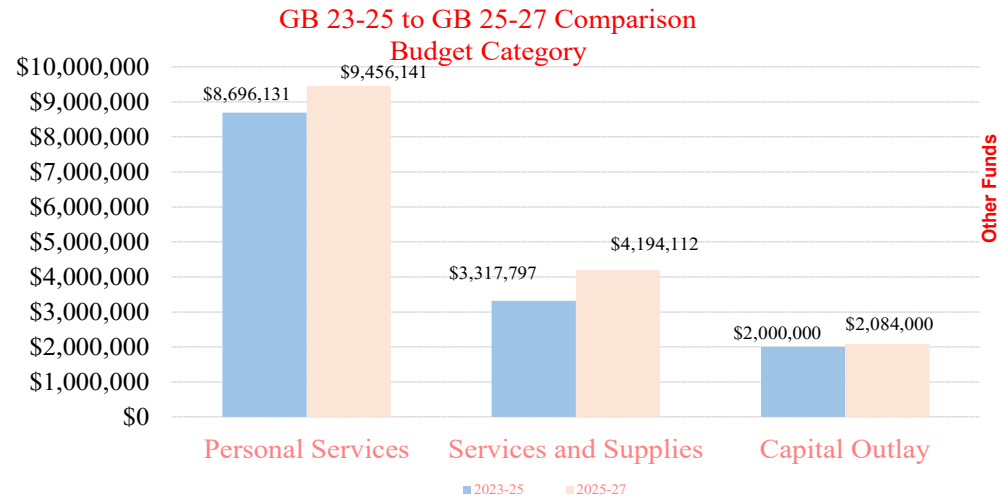
Agency Summary Narrative
Budget Summary Graphics

Governor's Budget Comparison

(All Other Funds)

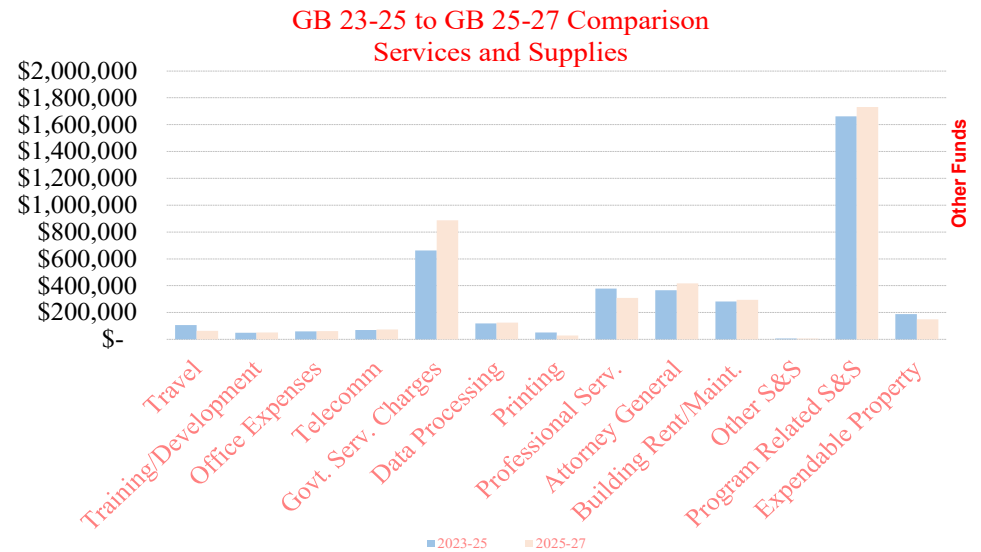
Budget Category

	2023-25	2025-27	Difference
Personal Services	\$ 8,696,131	\$ 9,456,141	\$ 760,010
Services and Supplies	\$ 3,317,797	\$ 4,194,112	\$ 876,315
Capital Outlay	\$ 2,000,000	\$ 2,084,000	\$ 84,000
Total	14,013,928	15,734,253	1,720,325



Services and Supplies

	2023-25	2025-27	Difference
Travel	\$ 107,334	\$ 63,650	\$ (43,684)
Training/Development	\$ 48,626	\$ 50,669	\$ 2,043
Office Expenses	\$ 58,989	\$ 61,467	\$ 2,478
Telecomm	\$ 70,231	\$ 73,181	\$ 2,950
Govt. Serv. Charges	\$ 661,687	\$ 887,915	\$ 226,228
Data Processing	\$ 118,785	\$ 123,774	\$ 4,989
Printing	\$ 50,311	\$ 28,144	\$ (22,167)
Professional Serv.	\$ 378,671	\$ 309,421	\$ (69,250)
Attorney General	\$ 365,688	\$ 417,076	\$ 51,388
Building Rent/Maint.	\$ 281,623	\$ 293,451	\$ 11,828
Other S&S	\$ 5,301	\$ 5,524	\$ 223
Program Related S&S	\$ 1,661,133	\$ 1,730,901	\$ 69,768
Expendable Property	\$ 187,481	\$ 148,939	\$ (38,542)
Total	\$ 3,995,860	\$ 4,194,112	\$ 198,252



Mission Statement & Statutory Authority

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.

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

Acknowledgements

Authors

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Greetings,

Over the past five years as Commissioner, I have had the privilege of continually engaging with consumers, licensees, and our industry partners to understand where the Agency may best serve the needs of Oregonians and deliver on the promise of our mission. In my conversations with stakeholders, it has been made clear that the daily work of the Agency has an impact. I appreciate that to meet the expectations of the public, we must operate with clarity of purpose and under a united vision of the future. In the 2023-2025 strategic plan, I seek to outline the core principles and distinct initiatives set to achieve our mandate and share the accomplishments we have made toward that effort since I began leading the Agency in 2019.



Steve Strode, Commissioner

In practical terms, this plan sets the Agency's near-term direction, establishes goals, prioritizes work, measures progress toward these efforts, and communicates to all interested parties. The foundation of this document is built from the priorities and strategies identified in the following predating documents, including the 2021-2023 Strategic Plan, 2023-2025 Affirmative Action and Diversity, Equity and Inclusion plans, 2023-2025 Legislatively Adopted Budget and 2023-2025 Succession Plan. This plan has been coordinated by the Real Estate Commissioner's office. It was originally developed in 2021 and 2022, then reviewed and updated in 2023 and 2024 by the Agency management team in consultation with the Governor's office with input by all Agency staff and through engagement with external stakeholders.

I am encouraged by the progress that we've made since publishing the last strategic plan and remain optimistic about the goals set forth in this updated version. I am confident that the Agency will successfully carry forward commitments made to Oregon's state Legislature, our Governor, more than 25,000 real estate licensees and all Oregonians engaging with professional real estate activity. The Agency expects the groundwork laid in this process to set the path for continued success, in the years to come.

Thank you for taking the time to review and consider this plan. Should you have any feedback, I encourage you to get in touch.

Sincerely,

A handwritten signature in black ink that reads "Steve Strode". The signature is fluid and cursive, written in a professional style.

Steve.Strode@rea.oregon.gov
971-301-0822

Background and Direction

Agency Origins

Oregon passed the first real estate license law in the United States on February 14, 1919, under the then Insurance Department of Oregon. The Real Estate Department was later organized within the Insurance Department. In 1939, the Real Estate Department was given independent status by the Legislature. In 1963, it became the Real Estate Division within the Department of Commerce. In 1987, the Department of Commerce was dissolved, and the Real Estate Division was renamed the Oregon Real Estate Agency and remains so today.

The Oregon Real Estate Agency now licenses and regulates over 31,000 real estate professionals and business organizations, including principal brokers, brokers, property managers and escrow agents.

We Are Today

OREA is an Executive Branch Agency of the State of Oregon, comprised of 34 FTE, charged with administering professional real estate licensing and regulating Oregon real estate license law ([ORS Chapter 696](#)), condominium law ([ORS Chapter 100.005 to 100.990](#)), sections of subdivision law ([ORS 92.305 to 92.990](#)) and administrative rule ([OAR Chapter 863](#)). The Commissioner, who is appointed by the Governor and an employee of the state, directs the Agency. The Commissioner oversees the administration of the Agency and is independently responsible for assessing sanctions for license law violations.

The Agency has a nine-member advisory board with authority to waive some application requirements for real estate license and continuing education provider applicants, as well as advise the Governor, Commissioner, and Agency on law, rule, and policy.

Our Mission

The mission of the Oregon Real Estate Agency 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.

Our Values

This Agency operates with the following values at the forefront of our daily decision-making as well as long-range strategic planning:

- Equity
- Respect
- Transparency
- Adaptability & Innovation
- Stewardship & Customer Service
- Accountability

Strategic Objectives

The following strategic objectives have been set with priority based on feedback from the public and Agency personnel and are outlined in detail on pages 12 through 17:

- Improve the User Experience & Create Efficiencies in the Online Licensing & Regulatory System.
- Demonstrate Effectiveness in Regulatory Outcomes with Compliance Program
- Increase Transparency and Consistency in the Regulatory Process (Regulatory Framework)

- Reduce Barriers to Licensure & Increase Public Engagement through Diversity, Equity and Inclusion Initiatives.

Guiding Principles

- **Regulatory Effectiveness (Appropriateness & Adaptability to Change)**
We regulate from a perspective of consumer and licensee impact. We are dedicated to adaptability as real estate practice evolves. In collaboration with our stakeholders, 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 (Equity & Transparency)**
We believe that equity is foundational to our purpose. 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 and thoughtful manner; and
- **Professionalism (Customer Service Excellence, Accountability & Respect)**
In all aspects of our work, we are accountable to the public, licensees and all of our stakeholders. We maintain an environment of inclusion, showing respect for all parties we engage with. We provide accurate information, consistently and reliably.

Strategic Plan Fundamentals

Holistic Approach

Each objective within this plan reaches beyond the responsibility of a single division or manager. These efforts require continuous, coordinated feedback from senior leadership and staff as well as expansive planning and considered implementation with the engagement of external and state government partners. The Agency values the many perspectives of our stakeholders, acknowledging that the efforts laid out in this plan cannot be realized effectively without a holistic, inclusive approach.

Methodology

The objectives and goals featured in this plan were originally developed as draft priorities by Agency leadership through a series of work sessions beginning in 2021 and feedback from the Oregon Real Estate Board. Initially, a SWOT analysis was performed to set the foundation assessment of the current state and identify key growth and improvement areas. From that effort, managers engaged with their respective teams to workshop draft division mission statements and consider aligning objectives and the Commissioner consulted with the Governor's office to outline core priorities. The culmination of that effort resulted in the final 2021-2023 OREA Strategic Plan. Through the 2021-2023 biennium these goals and their supporting projects and tasks were tracked from the Commissioner's office. Accomplishments and completed efforts are documented on page 11.

As this plan is a continuation and refresh of its predecessor, management recently took the opportunity to seek evaluative feedback from external partners and staff through anonymous surveys, gauging if the priorities outlined remain resonant, if the order of importance correlate, and

if the Agency's mission and guiding principles align with perspectives on the work. The objectives outlined are in rank priority based on that public feedback, and Agency and division mission statements and guiding principles were unchanged given that 100% of staff feel that the mission reflects the work of the Agency, 96% feel connected to the mission, 96% agree or strongly agree that the mission makes them feel that their job is important, 96% agree or strongly agree that their work embodies the guiding principles outlined here, and 100% of staff agree or strongly agree that the division mission statements accurately portray the team's purpose.

Monitoring & Accountability

To accomplish the goals and objectives set forth in this plan, monitoring progress will be essential. To create the underpinning of accountability, the plan will be shared with staff directly, reviewed at onboarding of new staff, disbursed to the Board, and published on the Agency website. Monitoring each goal is identified within the Objectives section but will generally be conducted by the Commissioner's office at weekly Managers' meetings, in monthly 1:1 meetings, as well as in an annual document and progress review as a management team. Progress toward goals is to be shared by managers at all staff meetings within division reports, at Board meetings, at the Agency's budget presentation to the Oregon Legislature, and through additional venues set forth in dedicated communication plans.

Agency Division Purpose Statements & Descriptions

Commissioner's Office – 4 FTE

The Commissioner's office directs the Agency through policy and sanction administration while ensuring transparency and accountability.

The Commissioner is appointed by the Governor and is responsible for the policy and direction of the Agency. The Commissioner works directly with the real estate industry and legislature to determine appropriate statutory authority, including new or revised statutes and rules. The Commissioner holds open participation and discussions with key parties when determining changes to the Agency's authority.

The Deputy Commissioner is appointed by the Commissioner and is responsible for the daily operations of the Agency, including the organizational structure of the Agency to meet the needs of consumers and licensees. The Deputy Commissioner employs the direction of the Commissioner and manages the Agency through division managers that supervise represented employees.

The Communications & DEI Director operates from within the Commissioner's offices and provides a full range of policy analysis, communication, and diversity, equity, and inclusion services to Agency management, employees, and external partners. This role is responsible for establishing, prioritizing, and promoting Diversity, Equity, Inclusion, and Belonging and Affirmative Action initiatives, internally and externally. This position is dedicated to driving stronger engagement and opening lines of communication.

The Agency has one full-time limited duration Project Manager operating from the Commissioner's Office. This position is responsible for leading the Agency's licensing and regulatory system replacement effort. In the 2025-2027 Agency Request Budget, the Agency will seek to make this position permanent, being responsible for all operational and IT-related projects.

Licensing & Education – 8 FTE

The Licensing and Education Division offers solution-based support to Oregon consumers, educators and real estate professionals, evaluates candidates for licensure, and facilitates compliance activities.

Education

The purpose of this program is to oversee the administration of license examinations and education services provided to applicants and real estate licensees. The program collects and analyzes information about the educational needs of the real estate industry and reviews certain educational courses. The program collaborates with the Commissioner and the Board to improve the OREA's external educational efforts.

The Education program carries out the Agency's mission by increasing the quality, format, and number of educational opportunities for licensees that will, in turn, increase the professionalism among licensees. 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.

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 approving 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, property managers, and escrow agents, the registration of business names, pre-license education providers, and unit owners associations, the submissions of condominium filings, and the certification of continuing education providers.

Functions include:

- Assisting applicants, real estate brokers, principal brokers, property managers, and escrow agencies as they use the Agency's online licensing system (eLicense) to apply for and 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;
- Providing general reception, licensing, and compliance information to the public; and
- Processing complaint intake.

Regulation – 10 FTE

The Regulation Division conducts fact-based, unbiased investigations and, if warranted, proposes

disciplinary action through the administrative process.

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, real estate marketing organizations, and other real estate-related investigations, within our jurisdictional purview. Division staff acts as impartial investigators and gather facts surrounding an open investigation file. Division staff conduct stipulation processing (dispute resolution) to resolve matters without a contested case hearing.

Compliance – 5 FTE

The Compliance & Audits Division ensures that licensees meet their fiduciary and administrative responsibilities through 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 the Agency (excluding legal advice) to licensees, the public, and other governmental agencies.

Functions include:

- Compliance reviews: Evaluate compliance surveys and assist licensees in coming into compliance within target of 45 days, where possible; and
- Clients' trust account reconciliation reviews: Assess compliance and identify cases for investigation.
- Escrow audits.
- Internal complaint and regulatory review.

Land Development – 1 FTE

The Land Development Division performs regulatory review and approval of condominium, timeshare, membership campground and subdivision projects created in Oregon or marketed to Oregonians.

The division is responsible for administering the Land Development Programs, which include: subdivision, condominium, timeshare, and campground registrations. The Land Development manager is responsible for drafting legislation and administrative rules.

Administrative Services – 5 FTE

The Administrative Services Division provides quality business services to the Agency and the public in a data-driven, people-centric manner.

This Division serves as a central service hub of the Agency, carrying responsibility for the general operations and adherence to governing compliance statewide policies.

Functions include:

- Fiscal services, including inventory control, remittance processing of revenue, accounts payable and receivable, payroll, and travel coordination;
- Purchasing and contracting;
- Oversight of the Agency's Information Systems staff, who provide word, data processing, LAN administration, project management and telecommunications

services; and

- Agency communications, including the development and publishing of educational information such as website content, the Oregon Real Estate News-Journal, brochures, and publications.

Agency Budget

The Agency's revenue is sourced by 'other funds.' These funds are collectively derived from licensing, registration, examination, and other related Agency services. The Agency does not receive federal, grant, general, or lottery funds. Civil penalties assessed and collected by the Agency through sanctions are transferred to the General Fund and do not contribute to the Agency reserve.

The [2023-2025 Legislatively Adopted Budget](#) is \$13,996,881.

Agency Partners

General Public:

Oregonians are consumers of licensed real estate activity through the purchase, sale, and rental of real property. Sales transactions are most frequently brokered through a real estate licensee and under the coordination of a registered escrow organization. While some owners directly rent their properties to tenants, most rentals are administered by licensed property managers. The professional activities of these services largely fall within the Agency's regulatory oversight. The impact our work has on Oregonians is meaningful.

Oregon Real Estate Board:

Oregon Real Estate Board consists of seven professional members and two public members, acting as an important conduit to industry practice. Outside of their board duties, members serve on Agency-organized committees for education, examination content review, rulemaking and policy considerations.

Applicants:

In 2023, an average of 336 individuals made application to the Agency monthly. These new entrants into the real estate profession interfaced with our approved educational material, examination, licensing systems, and customer support staff.

Licensees & Registrants:

31,000 licensees and registrants conduct licensed professional real estate activity in Oregon, including real estate brokers, property managers, real estate businesses, escrow agents, escrow branch offices, campground contract brokers, and telemarketing organizations.

Educators:

350 active private career schools, community colleges, post-license educators, and continuing education providers deliver thousands of professional education courses to applicants and real estate licensees each year.

Developers:

Real estate developers establish hundreds of subdivisions, condominiums, and timeshare estates in Oregon annually, seeking Agency plan approvals to establish and build new real estate projects in the state.

Attorneys:

Legal counsel representing members of the public, licensees, and developers with questions on application of law or in matters of complaint, investigation or administrative sanction continually engage with Agency management and staff.

Professional Organizations:

Industry groups representing real estate, escrow, property management, residential and commercial development, land development, timeshares, campground marketing, and educational interests interface with the Agency routinely on policy matters and for educational opportunities.

Tribal, Local, State and Federal Government:

The Agency collaborates and relies upon the expertise of many partners in tribal, local, state, and federal government to effectively conduct our regulatory charge. The Agency conducts business operations under the Governor of Oregon's statewide policy including finance, accounting, risk, procurement, fleet, human resources, and information security. The Agency executes records management under the authority of the Oregon Secretary of State in accordance with the policy set forth by the State Archivist and in collaboration with Oregon Tribal leaders. The Oregon Department of Justice serves as the Agency's legal counsel and Oregon Office of Administrative Hearings which adjudicates contested cases. The Agency coordinates with the Oregon Bureau of Labor and Industries, at the direction of the Labor Commissioner of Oregon, on matters related to Fair Housing violations involving Oregon real estate licensees.

External Factors

In the 2023 Oregon Legislative session, HB 4058 was passed. This bill modifies the Agency's authoritative chapter of law, ORS 696, by introducing a new regulated real estate profession (Wholesaler), mandating a written service agreement for licensees working with buyers, and prohibiting future right to list contracts (40-year listing agreements). This legislation represents the greatest change to Chapter 696 in more than a decade and presents a substantial effort for Agency management on a rapid timeline. The work required to thoughtfully execute an inclusive operationalization of this law is substantial and will include significant public engagement by way of rule writing work groups, communication of changes to all impacted licensees and prospective applicants, technical system modifications, and staff training. While this law is expected to strengthen the Agency's consumer protection mission overall, resources will be emergently directed to accomplishing its successful implementation and poses a constraint on goals otherwise set forth in this plan.

Another considerable factor that may impact the Agency's ability to successfully execute on the commitments of this plan and the mission at large include rapid and substantial changes occurring within the real estate industry today. Many news articles have been published over the last four years featuring the impacts of real estate on the consumer. While housing costs and the affordability crisis have been felt most deeply by the public, industry news has captured the many dynamic legal challenges to the principal trade organization, the National Association of Realtors (NAR), and several leading real estate firms regarding anticompetitive practices. The first being the Moehrl lawsuit, which emerged as a class action suit in Illinois in March 2020 alleging collusion and inflated commissions. A similar follow-on case was filed in Missouri in April 2020, known as the Sitzer/Burnett case. In November 2020, the United States Department of Justice filed suit as well alleging coordinated anticompetitive practices regarding commission sharing and multiple listing

services. These cases progressed through the justice system over the following years until fall of 2023 when the class action suits prevailed over the association. As part of the settlement, NAR agreed to implement substantive transparency and consumer-oriented changes to practice. Some analysts have offered reactionary predictions of the impact and suggested that this may impede the viability of the practice and significantly reduce the number of practitioners in business as a result. Others have suggested that, in fact, this will lead to growth in the industry and provide alternative models. The ultimate outcome and impact on the regulated professional will only be fully understood in time. Regardless, the Agency is called to continue to execute our mission and respond accordingly.

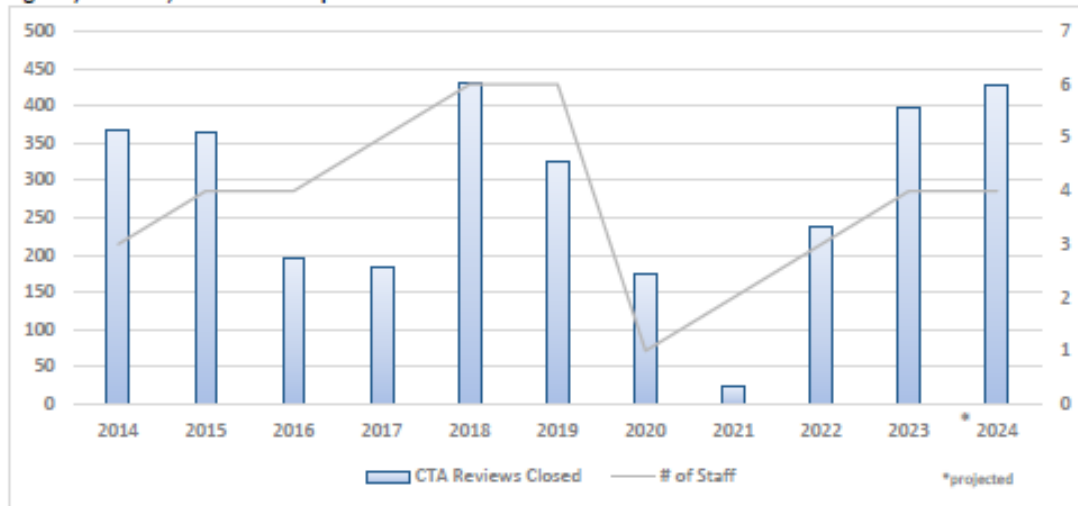
Accomplishments in Support of this Plan's Goals 2019-2023

- Conducted Preliminary Research to Support Development of Regulatory Framework
- Completed Examination Reviews with Industry Workgroups
- Modernized Advertising Rules with Industry Workgroup
- Instituted Remote Proctoring of License Exam
- Maintained or Increased Performance in All Legislative KPMs
- Hired a New Regulation Division Manager
- Increased Commissioner Role in Sanction Assessment
- Reshaped Regulatory Lead Worker Roles
- Initiated the eLicense Replacement System Project
- Hired a Dedicated Project Manager for eLicense Replacement
- Established Spanish Speaking Positions
- Delivered Bilingual Educational Content on Property Management
- Increased Collaboration with Industry Partners
- Eliminated Case Backlog
- Reduced Number of Days to Complete Investigation
- Increased Customer Service Performance
- Navigated to a Paperless Office
- Separated Complaint Intake from Regulation Division
- Established New Compliance Division
- Streamlined Investigative Practices
- Office Reconfiguration to Accommodate Mobile/Hybrid Workforce and Save on Archives Storage
- Maintained 100% Success at Contested Case Hearings
- Increased Stakeholder Engagement through Presentation Series on Engaging with the Agency
- Implemented Updated Information Sharing Procedures Directly with Oregon Bureau of Labor & Industries for Fair Housing Violations
- Implemented Updated Information Sharing Procedures Directly with Oregon Bureau of Labor & Industries for Fair Housing Violations
- Implemented Updated Information Sharing Procedures Directly with Oregon Bureau of Labor & Industries for Fair Housing Violations
- Maintained or Increased Performance in All Legislative KPMs
- Maintained Case Management Completion Targets, Prevented Case Backlog
- Hired a New Compliance Division Manager
- Received Funding Authority to Add Three FTE to Compliance Division
- Received Funding Authority for the eLicense Replacement System Project
- Hired a Dedicated Project Manager for eLicense Replacement Project
- Received Stage Gate 1 Endorsement for eLicense Replacement Project
- Produced Policies and Procedure Manuals for Staff in Core Program Areas: Licensing, Education, Compliance and Regulations
- Increased Collaboration with Industry Partners
- Streamlined Investigative Practices Creating More Guidance Through the Lifecycle of a Case
- Reconfigured Office to Accommodate Mobile/Hybrid Workforce and Save on Archives Storage
- Maintained 100% Success at Contested Case Hearings
- Established a Streamlined Complaint Intake Process to Expedite Processing and Reducing Barriers in Consumer Protection
- Increased Stakeholder Engagement through Presentation Series by Agency
- Commissioner Participated in Role on Fair Housing Committee, Membership Committee and Accepted Position on Board of Directors at Association of Real Estate Licensed Law Officials
- Identified Accessibility in Languages Other than English as a Requirement of Licensing Replacement System
- Implemented OregonBuys for Agency Procurement Activities
- Adopted M365 & Implemented Windows Defender, Tenable and Enterprise Intune for iPhones to Meet Cyber Security standards
- Published First Oregon Real Estate Agency Succession Plan
- Established Onboarding Processes and Checklists for New Hires
- Update Reconciliation Review Educational Material and Review Communications
- Increased CTA Review Production from Baseline Performance, Reached More Licensees

Objective 1: Demonstrate Effectiveness in Regulatory Outcomes with Compliance Program

In January 2022, the Agency established a new division, Compliance & Audits. This dedicated team was made responsible for continuing the execution of the clients’ trust account reviews, resurrecting the long dormant escrow audits, assuming responsibility for compliance reviews and conducting an operational analysis to identify areas for greater effectiveness while scaling the efficiency of Agency actions in these program areas.

The Agency recognizes that client funds held in trust by licensees pose an opportunity for threat to consumers. This compelled leadership to increase dedicated resources and address this risk exposure gap with increased and sustained oversight. Over the past 15 years, clients’ trust review work has been housed in various Agency divisions: Education (2007-13), Regulation (2014-2017) and Licensing (2018-2021). It was a secondary program to the core work of those divisions. As a result, the work was vulnerable to de-prioritization when primary workload increased. The historical processing counts displayed below demonstrate how production of completed reviews ebbed after a couple of years in a new division. By isolating this program into a core independent Agency division, the risk of de-prioritization is stemmed.



As part of the previous strategic plan, the Agency prioritized increasing resources in the division and as a result, the total number of reviews. To provide long term sustained support of this effort, the Agency requested and was granted three additional staff in the 2023-2025 Legislative Adopted Budget. Growing from a team of two in 2022, the team currently consists of five dedicated FTE including one Compliance & Regulatory Manager 1, one Fiscal Auditor, one Compliance Specialist 2, and three Compliance Specialist 1s. The team has increased reviews of all real estate firms holding client trust funds ensuring that all registered businesses holding funds on behalf of clients will participate in a review at least once every three years, meeting near term goals.

Having accomplished the 2021-2023 strategic objective to establish this division, the Agency is now taking the next step in realizing the overall vision of this team, to *Demonstrate Effectiveness in Regulatory Outcomes with the Compliance Program*. In other words, the Agency seeks to ensure that not only will the compliance work be completed consistently, but that this work will be effective at curtailing harm.

Core Work

Near term efforts involve evaluating opportunities for improved education and reimagining the compliance review program. The existing voluntary compliance reviews result in participants achieving 99% compliance rates on review of documents. Given that clients' trust account review data demonstrates 76% noncompliance findings, we recognize that this program is not encountering the licensees that would benefit most and must transition to a mandatory program, focusing on new entrants and those that have demonstrated noncompliance issues in the past.

Goals and Supportive Tasks

- Institute a Mandatory Property Management-Focused Compliance Review for New Licensees Conducting Property Management
 - Draft Compliance Review Content and Program Plan
 - Baseline Production Goals for 2025-2027
- Escrow Audit Program
 - Evaluate Previous Program by August 30, 2024
 - Assess Current Processes in Escrow Licensing & Renewals
 - Annual Reports
 - Financial Statements
 - Approval of New Escrow Organizations
 - Baseline Oregon Against Comparator States (laws, rules, procedures)
 - Escrow Audit Program Design Approved by June 30, 2025
- Implement an Annual Internal Review of Complaint and Regulatory Effectiveness
 - Complete Internal Audit Template by December 31, 2024
 - Complete Internal Audit Plan by June 30, 2025
 - Complete Inaugural Internal Audit Following Published Regulatory Framework by December 31, 2025
- Identify Opportunities to Leverage Education Upstream, Preventing Noncompliance
 - Review Existing Pre and Post Licensing Content by December 31, 2024
 - Draft Detailed Agency Content Specific to Client Trust Accounting by June 30, 2025
 - Identify Appropriate Format and Course Delivery Model by June 30, 2025
 - Collaborate with Educators to Ensure Practical Knowledge Acquisition by June 30, 2025

Success Measures and Indicators

- Compliance Review: Draft Content, Program Plan and Goals Approved by Commissioner's Office by June 30, 2025
- Escrow Audits: Complete Audits for 5% of Escrow Companies by Year 2 of Escrow Audit Introduction
- 95% adherence to Internal Audit Plan, Completed on Schedule with Full Participation of Agency Leadership
- Long Term - Overall: Reduce Non-Compliance in CTA Review from 76% to 25% by 2030

Alignment with Agency Mission

- The initiatives set forth in this objective allow for consumer protection ahead of harm. The purpose of establishing and improving the effectiveness of the work of the Compliance Division is to inform and oversee to the greatest extent possible with the resources available.

Performance Monitoring

- Monthly Check-In Meeting with Compliance Division Manager and Deputy
- Bimonthly Report Outs to Real Estate Board on Progress
- Monthly Management Team Report Out & Feedback Session
- Annual Review of Progress toward Strategic Plan at Management Team

Objective 2: Reduce Barriers to Licensure & Increase Public Engagement through Diversity, Equity and Inclusion Initiatives

As part of the 2019 Agency Report to the Legislature [Path to Licensure](#) the Agency researched existing barriers to real estate licensing for immigrants and refugees and committed to develop an action plan to reduce obstacles to entry.

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, the Agency 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, assessing where opportunities and needs may intersect.

As the Agency's mission is narrowly focused on consumer protection through occupational licensing and regulation of that license, mentorship programs and promoting license application are considered out of scope for the Agency as we are directly barred from the participation of real estate activity and cannot directly provide apprenticeship. However, it is within our scope to support and align organizations whose mission is to support the professional development of new entrants. At the request of the Oregon Realtors Diversity Committee, the Agency intends to implement demographic race and ethnicity data collection, on a volunteer basis, in the new licensing system to launch in 2025. This information will be shared with industry partners, in the aggregate, as an aid to further the reduction of barriers to the profession.

Core Work

Continue to expand accessibility for Spanish speaking members of the public in the regulatory process and reduce language barriers to licensure. Conduct outreach with affinity partners and build diverse bench of interested parties to participate in Agency workgroups, apply for board appointments and engage with through employee recruitment.

Projects to Support Goal & Strategies

- Publish Advertising Guide in Spanish & Identify Additional Priority Languages for Educational Content
- Establish Project Plan for Examination in Spanish
- Establish Educator Partners for PreLicense Education in Spanish
- Identify and Enroll Public Facing Staff in Cultural Competency Training
- Participate in Affinity Partner Meetings and Solicit Engagement on Real Estate Agency Operational and Policy Matters

Success Measures and Indicators

- Assist 90% of Spanish Speaking Callers on Initial Call and 99% within One Week.
- Recruit DEI Director to Oversee Agency Communications and Expand Public Engagement Efforts by September 1, 2024.
- Attend at least 75% of Annual Affinity Partner Meetings.

Alignment with Agency Mission

- Quality protection for all Oregon consumers of real estate is critical to being effective in our mission. Consciously engaging, making the Agency accessible, and creating opportunities for all perspectives and voices, while reducing barriers to entry, is simply the first steps in being more effective in all we do.

Performance Monitoring

- Weekly Check In Meeting with DEI Coordinator and Deputy
- Bimonthly Report Outs to Real Estate Board on Progress
- Monthly Management Team Report Out & Feedback Session
- Annual Review of Progress toward Strategic Plan at Management Team

Objective 3: Publish a Regulatory Framework Document

Building on the success of the previous Strategic Plan, with streamlined processes and improved overall case management performance, the foundation has been set to clearly document and articulate the considerations made in the case resolution process. This work will be established to fortify the Agency’s decision-making in assessing sanctions, securing proposed sanctions are consistently applied and appropriately considered against mitigating and aggravating circumstances uniformly, reducing opportunities for implicit bias and establishing a sound basis for regulatory precedent.



Core Work

Using a ten-year data set collected on Oregon Real Estate Agency historical sanctions, along with the Commissioner’s priorities on consumer protection and licensing violations, the Agency will develop a clear regulatory framework model. This tool will operate as an assessment device to ensure continuity in application of sanctions for violation of law and rule. With the guiding principle of adaptability in mind, this document will contain the flexibility to apply nuance and changing regulatory issues. We expect this instrument to operate as a further mechanism to control quality and safeguard that our work is equitably applied in an effective and logical manner.

Goals and Supportive Tasks

- Publish Regulatory Framework for an External Audience by June 30, 2025, to include the following tasks:
 - Document the Investigative and Regulatory Process for a Public Audience
 - Establish the role of an Equitable Lens in the Licensing and Regulatory Decision-Making Process
 - Clearly Identify Mitigating and Aggravating Circumstances
 - Assess Suitable Balance of Violation to Impact
 - Consider Appropriate Conditions for Progressive Discipline Pathways
 - Isolate Characteristics for Consumer Threat and Identify Criteria for Injunctive Action
 - Subpoenas
 - Cease and Desist Orders

- Suspension Through Investigation
- Receivership
- Document Where Rule and Law Address Regulatory Approach and Where Gray Areas Require Further Definition
- Incorporate Input from DOJ to Ensure Effective and Accurate Communication of Regulatory Approach
- Implement Supportive Internal Framework Tools for Regulatory Decision-Making
- Baseline Existing Outcomes for Consistency and Implement Supportive Internal Assessment Tools to Measure the Reliability of Application Ongoing

Success Measures and Indicators

- Annual Internal Audit of Outcomes Demonstrates Regulatory Consistency of 90% or greater with outliers documented.
- Fewer than 5% of respondents are subject to a sanction due to a repeat violation in a 10-year period

Alignment with Agency Mission

- Quality protection for Oregon consumers of real estate is at the center of our mission. Documenting and publishing a regulatory framework that explains how it is we go about the regulatory process supports that our mission is achieved in an equitable, consistent, and transparent manner

Performance Monitoring

- Monthly Check-In Meeting with Regulation Division Manager and Deputy
- Bimonthly Report Outs to Real Estate Board on Progress
- Annual Review of Progress toward Strategic Plan at Management Team

Goal 4: Improve the User Experience & Create Efficiencies in the Online Licensing & Regulatory System

The eLicense system acts as the core database of the Oregon Real Estate Agency. The current system was deployed in 2012 with a planned lifecycle of 10-12 years. To extend the life of the existing system, the Agency deployed a system upgrade, with an updated user interface in 2015, extending the life to 2025-2027. To meet this target and maintain timely and secure systems, the effort for replacement is currently underway with an expected replacement system launch in 2025.

eLicense

Over 31,000 licensees, business registrants, and stakeholder partners engage with the system in a user facing capacity. 25,000 licensees actively utilize the system for their biennial licensee renewal, during which they update 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 clients' trust account information, responding to an audit, and renewing their business registration annually. All of this, including associated payment when applicable, is conducted exclusively through the eLicense system. The Agency has not accepted paper applications since 2012.

The internal, Agency-facing platform, operates as a licensing database and case management software, integrating license application and maintenance information with the complaint, audit, and investigation modules. The system administers email communication to licensees for notification purposes, revenue intake and bank reconciliation processes, statistical license and investigative process reporting, examination data imports, and several workflow processes to issue a variety of applications. While this system performs the functions it was designed for and allowed the Agency to navigate to a paperless environment, real estate licensees are cutting edge users of technology and conduct their work in a highly efficient, mostly digital manner. There are many known efficiencies required to modernize the system to meet user needs, as well as several opportunities to improve the internal operations of the Agency's work.

The Agency expects the upgraded product will vastly improve all end users' experience as well as save licensees and the Agency substantial time. To date the Agency has received legislative authority to fund the upgraded system expenditure, received Stage Gate 3 endorsement by EIS, selected a system vendor, and completed the contract signing.

Core Work

The project team and system replacement vendor will execute the planned replacement implementation.

Projects to Support Goal & Strategies

- Launch Replacement System by Utilizing Greatest Extent of Opportunities for Automation without Compromising Quality or Effectiveness
- Improve the Customer Experience & Reduce Need for Telephone Support in Online Processes

Success Measures and Indicators

- Reduce the number of technical support calls due to unintuitive system functionality
- Improve customer service KPM by 3% over two biennia
- Reduce the number of days to complete an initial complaint review from 14 days to under

10

- Eliminate all external tracking spreadsheets and evaluation tools.
- Reduce customer complaints regarding mobile browser issues to 0-5 calls per month
- Reduce number of incorrect documents uploaded to fewer than 10 instances per month
- Offer online complaints access in Oregon's five most commonly spoken languages, other than English, per [Oregon Secretary of State](#)

Alignment with Agency Mission

- An upgraded, secure, and accessible system aligns with our consumer protection mission by minimizing friction in doing business with the Agency. This supports compliance in maintaining business and licensing information and makes the work of the Agency more efficient in all licensing, auditing, and regulatory efforts.

Performance Monitoring

- Weekly Project Meetings through Closeout of Project
- Monthly Steering Committee Meetings through Closeout of Project
- Bimonthly Report Outs to Real Estate Board on Progress of Project Following Project Implementation Kickoff
- Bimonthly Feature in Real Estate News Journal and Monthly Employee Newsletter

Criteria for 2025-27 Budget Development

The goals inherent in OREA's mission are used as the basis to develop this budget proposal. We strive for effective regulation with a prudent fiscal approach. As market forces change, the Agency is committed to providing a regulatory return on investment through expected reductions in revenue. This budget is conservative, with no new investment requests, while continuing to follow through on aggressive plans for greater impact in consumer protection.

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 and allows for a reduced costs over time through increased automation and employee attrition,
 - Reduces processing times experienced by applicants,
 - Modernizes the user experience for real estate applicants, business managers and renewing licensees, and
 - Provides greater transparency to the public with real time access to data and greater efficiency in the production of data.
- Increase efficiency through refined program activities and automation in reconciliation reviews and audits in the Compliance Division, thereby increasing the Agency's consumer protection reach.
- Continue to keep the Board and industry actively involved with the Agency and the Commissioner through outreach and Agency presence at the tables of affinity partners.
- Engage with the regulated community seeking continuous feedback on the effectiveness of all OREA programs.
- Safeguard reserve funds to the greatest degree possible for expected reductions in revenue while anticipating a fee increase request in the 2027-2029 Agency Request Budget.

2025-27 Short-Term Agency Plan

1. eLicense System Replacement

The foremost goal in the 2025-2027 biennium is to implement and finalize the project to replace OREA's existing licensing and regulatory software, 'eLicense'. The Agency's current system launched in 2012, with a user experience upgrade in 2015, is now supported and maintained by Tyler Technologies and hosted through AWS. The product is the principal platform for conducting business with OREA and serves as the core repository for license and business application processing, and audit/case management tracking. All work is administered in the electronic environment of eLicense. OREA is in the implementation stage of this effort, committing to deliver a tool that improves service, meets the expectations of users, and creates efficiencies in all internal business lines and program functions.

The Agency's key external partners are real estate licensees, who are early adopters and heavy users of technology for business. They expect a frictionless experience when engaging with the Agency, which is 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 build a healthy reserve fund to withstand the next market cycle downturn as well as finance this project. At the request stage of the 2023-2025 budget the needed cash reserves had been established and the Agency was granted legislative approval for funding of this new system, with the support of industry testifying in the Agency's budget hearing.

The eLicense Replacement Project is now underway, a multi-year effort (Project Close Out - 2026) with software and related project costs not to exceed two million, three hundred thousand dollars (other funds limitation, capital outlay).

2. Ongoing Policy Considerations – External Partner Engagement

In the 2024 Session, the Oregon Legislature passed HB 4058, a multi-faceted piece of legislation with notable impacts to the practice of real estate. This required considerable rule writing, to be facilitated and coordinated by the Agency. Broadly, this law directs the establishment a new registration category within the Agency’s jurisdiction to regulate residential property wholesaling, it requires increased disclosure to consumers, and directs a written representation agreement with brokers and buyers in real estate sales transactions.

Residential Property Wholesaling Registration & Wholesale Transaction Disclosure

Functionally, wholesaling is an industry adjacent model in which an individual wholesaler directly attains a sales purchase agreement with a homeowner at an agreed upon price and then markets the home to interested buyers, closing with a secondary investor or final buyer separately, absent of the seller experiencing any increased financial yield beyond the initial agreement with the wholesaler. A wholesaler operates as a ‘go-between’ within the open transaction and establishes a profit as the transaction is closed under the secondary sales agreement, at a higher price. Prior to the establishment of HB 4058, this activity was outside of the ORS Chapter 696 definition of real estate activity and as a result was unregulated in Oregon. The newly passed legislation now brings this activity within the jurisdiction of the Real Estate Agency, requiring practitioners to submit to a background check and registration with the Agency to safeguard against predatory actors, as well maintain the registration on an annual basis. Further, and importantly for consumer protection, wholesalers are required to disclose the conditions of the agreement with the homeowner under the new law. Unregistered wholesalers will face civil penalty sanction. Registered wholesalers who fail to adhere to registration maintenance and disclosure regulation are subject to sanction, including revocation.

Buyer Broker Written Agreement

While consumers faced challenging market conditions over the past several years, legal disputes aimed at the principal trade organization (the National Association of Realtors (NAR)) and several leading real estate firms, unfolded. Consumers complained of coordinated, anticompetitive practices which resulted in a lack of transparency in the purchase process and artificially inflated prices. The historical standard for real estate transactions involves the seller negotiating the commission to be paid to their broker within their listing agreement which then dictated the portion of that commission to be paid to the future buyer’s broker at the time of the forthcoming sale. The buyer and seller agree on the sales price, but the brokers are paid as predetermined in the seller’s listing agreement. Buyers complained that this structure ultimately undermined their ability to negotiate the amount paid to their representative broker and thus inflated the purchase price. The association argued that the buyer can negotiate through the purchase price and dictate the final arrangement in the sales contract, but buyers contended that they were unaware and the professionals they were relying on in the transaction were disincentivized to make them attentive to this fact.

These cases progressed through the justice system over the following years until fall of 2023 when the class action suits prevailed over NAR. As part of the settlement, the association agreed to implement substantive transparency and consumer-oriented changes to practice. Shortly thereafter, bipartisan legislation was introduced and passed through the Oregon state legislature to require a written buyer representation agreement, establishing a mandate for greater transparency for consumers with their ability to dictate the fees they pay to their buyer’s broker.

In collaboration with industry partners and consumer advocacy expertise, OREA has concluded the rulemaking process to implement this bill. The Agency will continue to evaluate the impact of this new legislation as well as the need to update other disclosure documents in support of consumer protection through the 2025-27 biennium.

2025-29 Long-Term Agency Plan

Compliance Division & Associated Programs

In 2022, the Agency established the Compliance & Audits Division, which dedicates focused resources toward compliance-related activities in support of fraud prevention and strengthens 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.

Given the potential for broad consumer impact, the Agency sought to fill the risk exposure gap and establish greater resources to the prevention of financial fraud under its jurisdiction. In the 2023-25 biennium the Agency was granted funding to increase FTE in the division, growing the team from three to six. The newly dedicated staff have responsibility for reviewing registered businesses holding client trust funds and conducting routine escrow audits. These positions have now been filled, and the Agency has increased clients trust account reviews by 68% from 2022 to 2024 and is on pace to realize another 25% increase in review production in 2025. In addition, the Agency has initiated the program development work to establish an escrow audit program, with initial audits to be conducted in 2025.

Near term, work involves continuing to make practical adjustments to established financial review work with the effort to maximize reach without compromising review or audit quality. Management will continue to monitor the performance and impact of the additional resources, measuring for regulatory impact. This division will review policies, practices, rules, and laws to identify opportunities for greater process efficiency and increased consumer protection. Following the refinement of the clients' trust account review program and the implementation of escrow audits, on a longer-term basis, the division will absorb oversight of the education program. Early findings in the establishment of this program point to opportunities to improve education overall. From the pre-license stage and exam to mandatory post-license education and required ongoing continuing education, there are opportunities to improve understanding of the practical application of law and rule. Education is a critical union with compliance and the segregation of these two programs does not allow the Agency to leverage the upstream opportunity to prevent lower impact non-compliance.

The Agency has established the reach goal of reducing noncompliance findings from 85% of reviews in 2024 to 15% by 2030.

Projects to Support Goal & Strategies

- Extend capabilities of the eLicense Replacement System to vastly scale automated analysis and audit concerns, expanding reach of program for improved consumer protection. The upgraded licensing and regulatory product include requirements to implement automated, AI document reading tools in order to seek discrepancies in financial statements provided to the Agency. This will allow much of the work currently done by staff manually to be performed in an automated fashion, surfacing noncompliance and concerning findings for staff scrutinization. This should allow the Agency to rapidly increase our ability to conduct reviews and collect large-scale data for compliance concerns.
- Increase Agency education efforts:
 - The division will review all course material and course delivery methods relevant to compliance programs to improve applicability and relationship to outcomes. Very high

noncompliance rates are observed in the handling of clients' funds and the monthly reconciliation process required by licensee conducting property management, leading the Agency to estimate that there is significant distance between course material and application in practice.

- The Division will provide increased educational content directly to licensees, allowing for an interactive engaging process directly with Agency experts.

The Oregon Real Estate Agency (OREA) is committed to encouraging an environment of diversity, equity, and inclusion (DEI) in our operations. Please see the Agency's complete Affirmative Action and Diversity, Equity and Inclusion Plan in the Special Reports section of this budget.

Cover Memo

We recognize that the real estate sector has historically been marked by inequities. We are dedicated to finding ways to address and correct these disparities.

Who benefits from agency programs, both directly and indirectly?

OREA's programs benefit a wide range of stakeholders. Direct beneficiaries include developers, industry professionals, and property owners utilizing the services of licensed property managers. Indirect beneficiaries include all Oregonians who participate in real estate transactions or reside in properties managed by a property manager.

Who will be burdened by agency programs?

As a licensing and regulatory Agency, our programs may create some burdens to small businesses related to fee maintenance and to licensees who are often independent contractors or small business owners and may experience financial burdens due to fees. The burden may disproportionately affect new entrants to the field who conduct less business compared to well-established professionals.

How does the agency increase or decrease racial equity? Do proposed new programs have potential unintended/racial equity consequences? What benefits may result from the program?

OREA acknowledges the historical context of inequity and racist policies such as redlining. This has resulted in barriers to home ownership and generational wealth for people of color, particularly Black and Indigenous Oregonians. We are working to address these issues.

In 2022, we implemented robust Fair Housing content as part of the mandatory education for all licensees, increasing awareness and promoting equitable practices.

The implementation of our Compliance Program in 2023 has increased oversight on property management activities, working to prevent financial harm that may disproportionately affect marginalized communities. These initiatives aim to increase racial equity by ensuring fair practices and protecting consumers.

The Agency is onboarding the Communications & DEI Director on September 1, 2024. This role will operate from within the Commissioner's offices and provide a full range of policy analysis, communication, and diversity, equity, and inclusion services to Agency management, employees, and external partners. This position is dedicated to driving stronger engagement and opening lines of communication.

Whose voices and perspectives are not at the table? Why?

The Agency recognizes that there is an opportunity to increase consumer voices and perspectives in our decision-making processes, particularly in rule writing and legislative work groups. But we have made progress. The appointment of Jessenia Juarez to the Oregon Real Estate Board has brought a perspective on lending and the barriers to home ownership.

But we acknowledge that there is a need to engage with consumer advocacy partners. We are committed to actively seeking out and incorporating diverse consumer perspectives to ensure our policies and practices serve Oregonians equitably.

What does the agency do to ensure multiple perspectives are part of our decision-making process? OREA strives to incorporate multiple perspectives in our decision-making process. OREA makes use of the diverse viewpoints of our board members, who bring a range of experiences and backgrounds to the table. 56% of our board identify as persons of color.

We also engage with affinity-related partners, such as Commissioner Steve Strobe's partnership with the Oregon Realist (whose mission is to strengthen the consumer capacity of Black, minority, and emerging target market segments) and his participation with the Asian Real Estate Association and the LGBTQ+ Real Estate Alliance. The Agency actively seeks input from consumer advocacy groups and underrepresented communities, and encourages participation from diverse stakeholders in our rule writing and legislative work groups

The Oregon Real Estate Agency is committed to ongoing improvement in our diversity, equity, and inclusion efforts. This work is not a one-time task, but a continuous process of learning, adapting, and implementing change. As we move forward, we will regularly assess the impact of our initiatives, seek out new partnerships to broaden our perspective, and strive to create a more equitable and inclusive real estate landscape that truly serves all Oregonians.

Security, Efficiency, Accessibility and Transparency

The targets of the OREA Strategic IT Plan reaches across all agency divisions, managers, and staff. These efforts 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 stakeholders, 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 stakeholders, 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 stakeholders. 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. It is used by all agency staff and stakeholders to conduct business for licensure, audits, and case management, public inquiry, land development filings, escrow bonding, and revenue reconciliation. Over 40,000 users, including: licensees, business registrants, and industry partners, engage with the system in a user-facing capacity. 25,000 licensees actively utilize the system for their biennial licensee renewal, during which they update 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 users are eager for technology upgrades, as real estate professionals are used to conducting their work in a highly-efficient, mostly digital manner. There are many known efficiencies required to modernize the system to meet their 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 2025-27 biennium. 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 and again in the summer of 2024, 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 including improving the Agency's hardware and software inventory documentation practices.

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. - Complete
- Submit Policy Option Package for Funding for the eLicense Replacement System Project – Complete
- Contract with Vendor for Replacement System - Complete
- Implement Cybersecurity Updates from 2024 Cybersecurity Assessments – In Progress
- Update Agencywide IT Policies - Complete
- Migrate to Enterprise Intune M365 for iPhones – Complete
- Tenable Security Upgrade – Complete
- Employ Opportunities for Continued Automation Amongst Agency Systems – In Progress

Summary of 2025-27 Budget

Summary of 2025-27 Biennium Budget

**Real Estate Agency
Real Estate Agency
2025-27 Biennium**

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

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2023-25 Leg Adopted Budget	34	34.00	13,996,881	-	-	13,996,881	-	-	-
2023-25 Emergency Boards	-	-	695,110	-	-	695,110	-	-	-
2023-25 Leg Approved Budget	34	34.00	14,691,991	-	-	14,691,991	-	-	-
2025-27 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	(1.00)	1,003,357	-	-	1,003,357	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2025-27 Base Budget	33	33.00	15,695,348	-	-	15,695,348	-	-	-
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	74,318	-	-	74,318	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	(20,249)	-	-	(20,249)	-	-	-
Subtotal	-	-	54,069	-	-	54,069	-	-	-
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)	-	-	303,583	-	-	303,583	-	-	-
State Gov't & Services Charges Increase/(Decrease)			338,518	-	-	338,518	-	-	-

Summary of 2025-27 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2025-27 Biennium

Governor's 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	-	-	642,101	-	-	642,101	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2025-27 Current Service Level	33	33.00	16,391,518	-	-	16,391,518	-	-	-

Summary of 2025-27 Biennium Budget

Real Estate Agency
Real Estate Agency
2025-27 Biennium

Governor's 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: 2025-27 Current Service Level	33	33.00	16,391,518	-	-	16,391,518	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	(1)	(1.00)	(719,280)	-	-	(719,280)	-	-	-
Modified 2025-27 Current Service Level	32	32.00	15,672,238	-	-	15,672,238	-	-	-
080 - E-Boards									
081 - May 2024 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
082 - September 2024 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	207,976	-	-	207,976	-	-	-
092 - Statewide AG Adjustment	-	-	(33,671)	-	-	(33,671)	-	-	-
093 - Statewide Adjustment DAS Chgs	-	-	(112,290)	-	-	(112,290)	-	-	-
100 - Wholesaler Registration - Fee Establishment	-	-	-	-	-	-	-	-	-
Subtotal Policy Packages	-	-	62,015	-	-	62,015	-	-	-
Total 2025-27 Governor's Budget	32	32.00	15,734,253	-	-	15,734,253	-	-	-
Percentage Change From 2023-25 Leg Approved Budget	-5.88%	-5.88%	7.09%	-	-	7.09%	-	-	-
Percentage Change From 2025-27 Current Service Level	-3.03%	-3.03%	-4.01%	-	-	-4.01%	-	-	-

Summary of 2025-27 Biennium Budget

Real Estate Agency
Real Estate Agency
2025-27 Biennium

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

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
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Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2025-27 Base Budget	33	33.00	15,695,348	-	-	15,695,348	-	-	-
Essential Packages									
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Vacancy Factor (Increase)/Decrease	-	-	74,318	-	-	74,318	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	(20,249)	-	-	(20,249)	-	-	-
Subtotal	-	-	54,069	-	-	54,069	-	-	-
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)	-	-	303,583	-	-	303,583	-	-	-
State Gov't & Services Charges Increase/(Decrease)			338,518	-	-	338,518	-	-	-

Summary of 2025-27 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2025-27 Biennium

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

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	642,101	-	-	642,101	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2025-27 Current Service Level	33	33.00	16,391,518	-	-	16,391,518	-	-	-

Summary of 2025-27 Biennium Budget

Real Estate Agency
 Real Estate Agency
 2025-27 Biennium

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

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal: 2025-27 Current Service Level	33	33.00	16,391,518	-	-	16,391,518	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	(1)	(1.00)	(719,280)	-	-	(719,280)	-	-	-
Modified 2025-27 Current Service Level	32	32.00	15,672,238	-	-	15,672,238	-	-	-
080 - E-Boards									
081 - May 2024 Emergency Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
082 - September 2024 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	207,976	-	-	207,976	-	-	-
092 - Statewide AG Adjustment	-	-	(33,671)	-	-	(33,671)	-	-	-
093 - Statewide Adjustment DAS Chgs	-	-	(112,290)	-	-	(112,290)	-	-	-
100 - Wholesaler Registration - Fee Establishment	-	-	-	-	-	-	-	-	-
Subtotal Policy Packages	-	-	62,015	-	-	62,015	-	-	-
Total 2025-27 Governor's Budget	32	32.00	15,734,253	-	-	15,734,253	-	-	-
Percentage Change From 2023-25 Leg Approved Budget	-5.88%	-5.88%	7.09%	-	-	7.09%	-	-	-
Percentage Change From 2025-27 Current Service Level	-3.03%	-3.03%	-4.01%	-	-	-4.01%	-	-	-

Real Estate Agency

Agency Number: 91900

Agencywide Program Unit Summary
2025-27 Biennium

Version: Y - 01 - Governor's Budget

<i>Summary Cross Reference Number</i>	<i>Cross Reference Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
050-00-00-00000	Real Estate Agency						
	Other Funds	9,914,221	13,996,881	14,691,991	15,791,518	15,734,253	-
TOTAL AGENCY							
	Other Funds	9,914,221	13,996,881	14,691,991	15,791,518	15,734,253	-

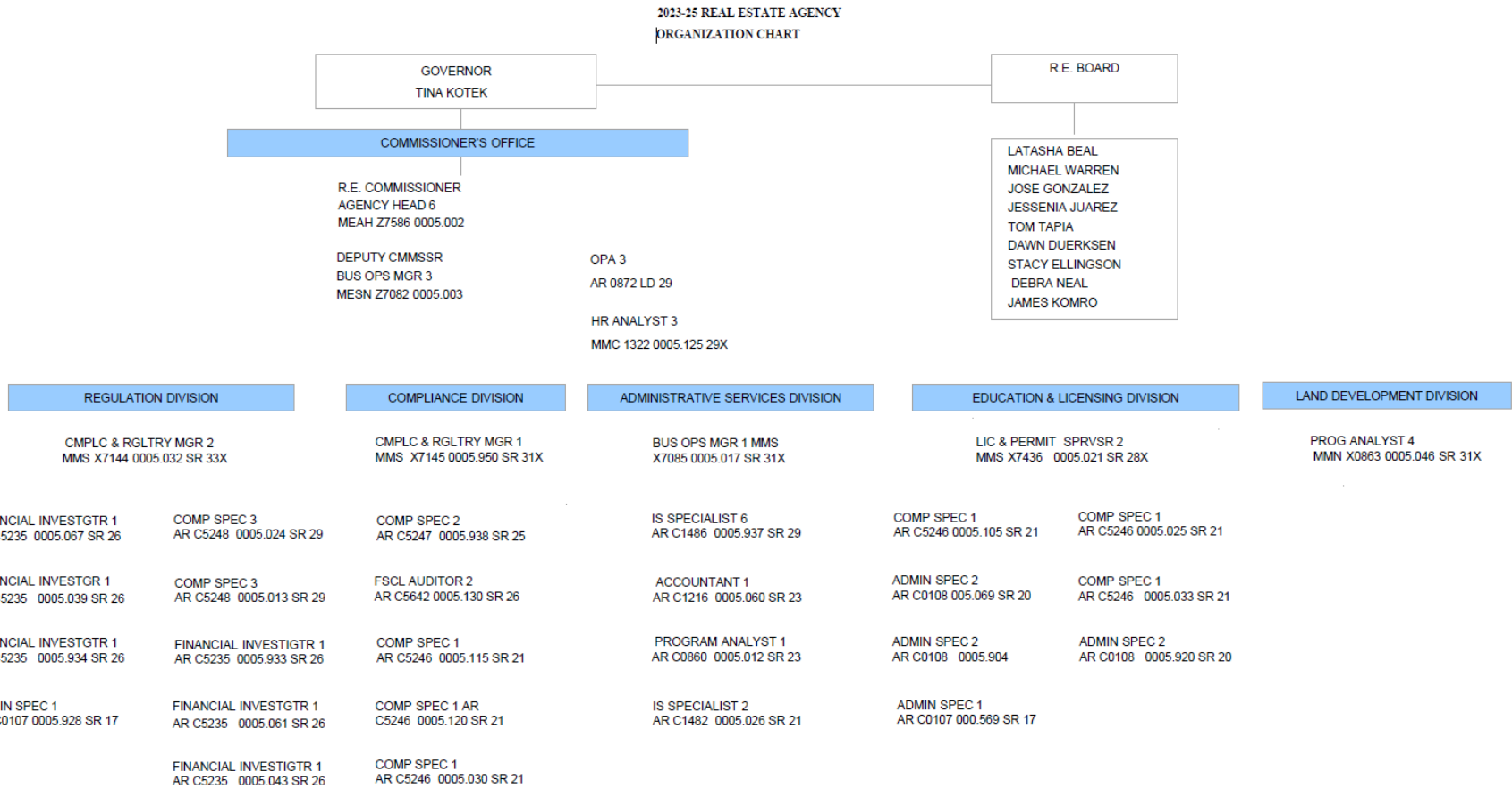
Program Prioritization for 2025-27

Rank	Division Descriptions	Key Performance Measures	OF/Total Funds	FTE	Enhanced Program	Reduction Option
1	Compliance & Audits (Clients' Trust Account Reconciliation Reviews, Compliance Reviews, Escrow Audits)	KPM 1 - % of property managers/principal brokers reviewed who meet compliance	\$2,950,172	6.00	N	Y
1	Licensing: <i>Customer Service</i> (Complaint intake, Background Investigations. Licensing: Applications, Renewals, Business and Branch Office Registrations.)	KPM 4 - % of property managers/principal brokers who rate the exam as effective KPM 6 - customer service standards	\$3,441,867	7.00	N	Y
1	Regulation and Enforcement (Complaints, Investigations, Administrative Actions, Civil Penalty Enforcement)	KPM 2 - Days to complete investigation KPM 3 - Contest Case Actions resolved through resolution	\$4,916,954	10.00	N	Y
2	Administrative Services: (Budget, Accounting, Information Technology, Personnel & Payroll, Contracts & Procurement)	KPM 6 - Customer Service Standards	\$2,458,477	5.00	N	Y
3	Land Development (Condominium, timeshare, membership campgrounds registrations, and Real Estate Marketing Organization licensing & regulation)	KPM 6 - Customer Service Standards	\$491,696	1.00	N	N
4	Commissioner's Office (Commissioner and Deputy Commissioner's office, Real Estate Board and Advisory Group Support, Administrative Rule Reviews and Legislative Concept Development)	KPM 6 - Customer Service Standards	\$1,475,087	3.00	N	N

10% Reduction Option

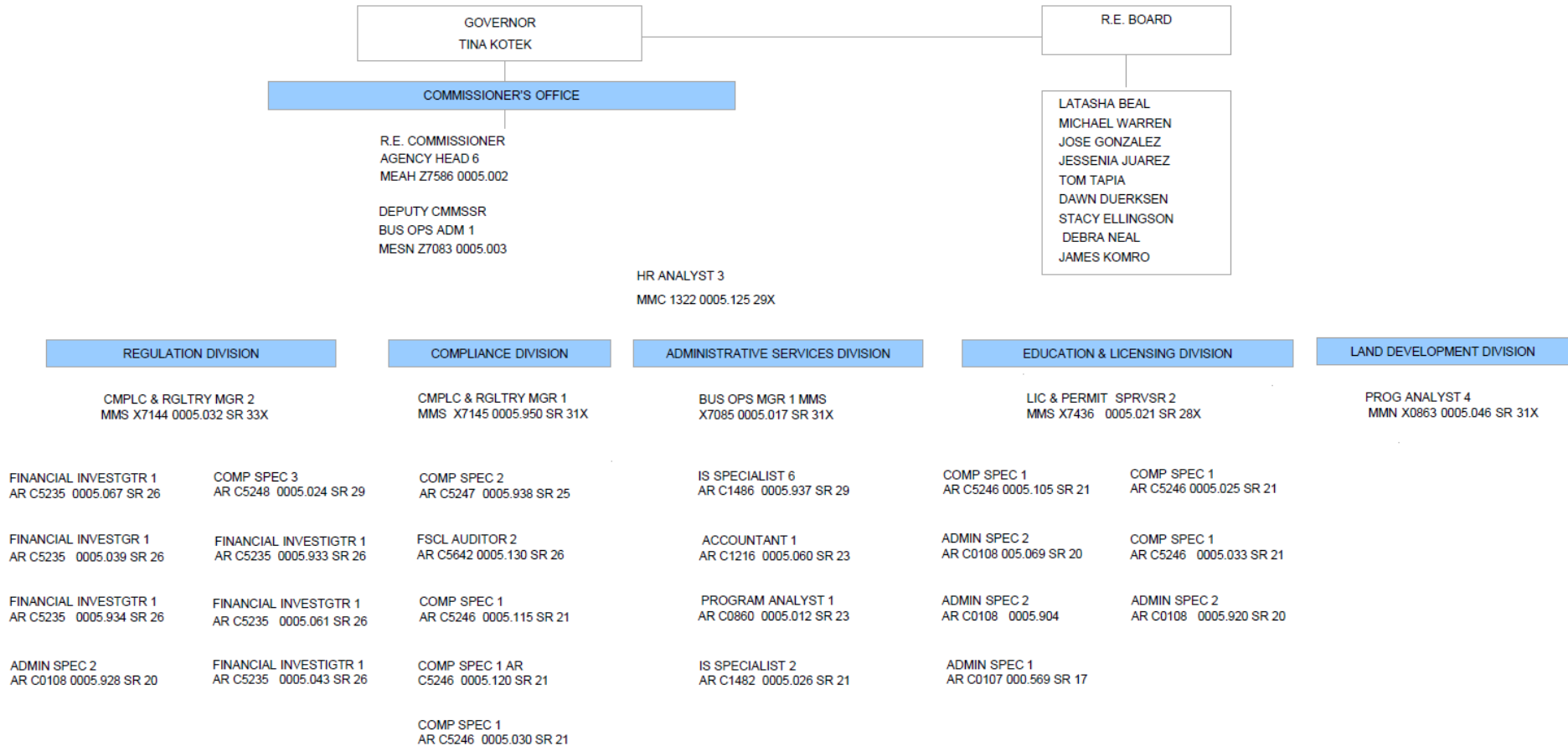
Activity or Program	Describe Reduction	Amount and Fund Type	Rank
Travel Reduction	Significantly reduce Agency travel including number of in person board meetings and trainings offered by the Agency throughout the state. Will impact Agency’s stakeholder engagement.	\$48,192 Other Funds	(1)
Publicity & Publications	Reduce expenditures related to subscription services for Agency memberships and publications as well as printing related service costs.	\$24,280 Other Funds	(1)
Professional Services	Defer professional and IT professional services.	\$95,000 Other Funds	(1)
Defer IT Expenditures	Defer IT expenditures to following biennia.	\$46,416 Other Funds	(1)
Regulation – Fulltime Permanent Staffing Reduction	Eliminate one Compliance Specialist 3 position. Management and remaining staff would absorb duties. Work product quality and delivery time at risk.	\$285,087 Other Funds	(1)
Licensing– Fulltime Permanent Staffing Reduction	Eliminate two Compliance Specialist I and one Administrative Specialist 1 positions. Management and remaining staff would absorb duties. Work product, customer service ratings, and delivery time at risk.	\$623,643 Other Funds	(2)
Regulation – Fulltime Permanent Staffing Reduction	Eliminate two Financial Investigator I positions. Management and remaining staff would absorb duties. work product, customer service ratings, and delivery time at risk.	\$482,260 Other Funds	(2)

2023-25 Organizational Chart



2025-27 Organizational Chart

2025-27 REAL ESTATE AGENCY ORGANIZATION CHART



REVENUES



Revenue Forecast Narrative

OREA is entirely self-sustained through Other Fund (OF) revenues. These funds are derived from license application, real estate and escrow business registration and associated renewal fees, as well as land development and condominium review fees. All civil penalties assessed by the Agency are transferred to the General Fund in accordance with statute.

OREA is currently in the midst of a revenue decline cycle and expects this deceleration could continue through the 2027-2029 biennium or longer. The depth of that decline is unknown at this point, dependent on the external economic forces and the outcome of unprecedented industry changes, currently underway and discussed at greater length in the Industry Environment & Criteria for Budget Development sections of this document. The known indicators suggest an approximate 5% decline in revenue in the 2025-27 biennium which may reach up to 15% or more over time.

The total licensing count peaked in June of 2022. As of December 2024, the total license count is down by 4%. However, the average number of new licenses issued by month in 2024 is down by 26% as compared to the cycle top two years ago. As projected in the prior budget, the public perception of real estate as an attractive occupation to enter, is cooling rapidly. For the time being, renewal numbers are sustaining, with only a 1.5% increase in lapse rates between 2022 and 2024, undergirding the overall limited decline in license totals. Should new license rates continue to decline and lapse rates increase, the basis for the upper end of the projection at 15% or higher revenue decline, will be realized.

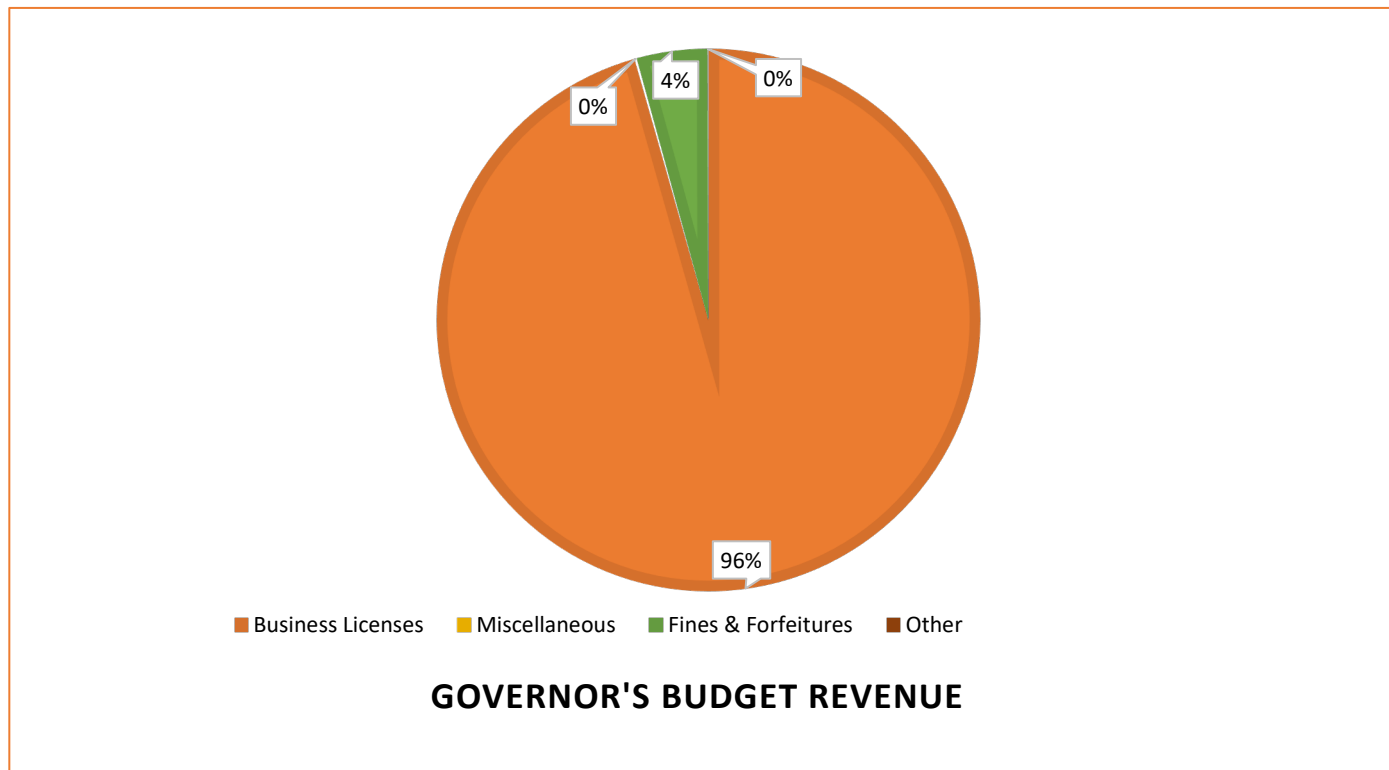
Approximately 3-5% of Agency funds are derived from condominium filing related fees. This revenue stream experienced a sizeable 50% reduction between 2019 to 2020, and has been progressively rebuilding, year over year toward pre-pandemic averages. 2022-2024 saw approximately 20-25% fewer filings than in the 2018 height but has leveled off to a steady state.

The fee structure for existing license types will remain unchanged with the introduction of one new registration type of Wholesaler. In the 2024 Legislative Session HB 4058 was passed, establishing a new registration program and regulatory oversight of real estate wholesaling activity in Oregon, to be overseen by the Agency. The Agency does not estimate there to be an abundance of wholesaling activity in Oregon and thus does not anticipate this new registration type will generate significant revenue. Policy Option Package 100 projects 25 individuals will register as a Wholesaler in the first year of establishment and will renew the following year. The revenue derived from this new registration is estimated to comprise of one thousandth of the Agency's 2025-27 projected revenue.

Given the current reduction in revenue along with the anticipation of continued declines, the Agency intends to seek a licensing fee increase in the next biennium and anticipates proposing a fee increase package in the 2027-2029 Agency Request Budget. This will result in a ten-year period without increased fees, reflecting the Agency's commitment to financial stewardship.

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.
- Wholesale registration - \$300*.
- Wholesale registration renewal - \$300*.



Revenue by Source

Source	Fund	ORBITS		2023-25		2025-27		Legislatively Adopted
		Revenue Acct	2021-2023 Actual	Legislative Approved	2023-25 Estimated	Agency Request	Governor's Recommended	
Business Licenses	Other	205	\$10,946,626	\$11,187,889	\$11,619,463	\$10,542,900	\$10,542,900	
Miscellaneous*	Other	410	\$1,235	\$18,938	\$2,673	\$2,115	\$2,115	
Fines and Forfeitures	Other	505	\$360,316	\$490,824	\$528,678	\$503,861	\$503,861	
Other Revenues	Other	0975	\$3,217	\$5,300	\$4,353	\$3,591	\$3,591	
Transfer to Gen. Fund	Other		(\$68,927)	(\$64,500)	(\$83,561)	(\$68,938)	(\$68,938)	
Total			\$11,242,467	\$11,638,451	\$12,071,606	\$10,983,529	\$10,983,529	

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

Real Estate Agency
2025-27 Biennium

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

<i>Source</i>	2021-23 Actuals	2023-25 Leg Adopted Budget	2023-25 Leg Approved Budget	2025-27 Agency Request Budget	2025-27 Governor's Budget	2025-27 Leg. Adopted Budget
Other Funds						
Business Lic and Fees	10,946,626	10,492,779	11,187,889	10,542,900	10,542,900	-
Charges for Services	1,235	18,938	18,938	2,115	2,115	-
Fines and Forfeitures	360,315	490,824	490,824	503,861	503,861	-
Other Revenues	3,215	5,300	5,300	3,591	3,591	-
Transfer to General Fund	(68,927)	(64,500)	(64,500)	(68,938)	(68,938)	-
Total Other Funds	\$11,242,464	\$10,943,341	\$11,638,451	\$10,983,529	\$10,983,529	-

PROGRAM UNITS



The primary divisions and programs of OREA are:

Office of the Real Estate Commissioner

The Real Estate Commissioner's office provides general leadership, regulatory oversight, policy guidance, communication and DEI/Affirmative Action direction to the various divisions and programs of OREA.

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, Human Resources and IT

This division manages business and IT services for the agency, including:

- Fiscal services, including inventory control, remittance processing of revenue, accounts payable and receivable, payroll, and travel coordination;
- Human resources;
- Purchasing and contracting; and
- Oversight of the agency's Information Systems staff, who provide word, data processing, LAN administration, project management and telecommunications services.

Licensing

The purpose of this program is to administer the licensing and license maintenance 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 wholesalers 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 and wholesalers;
- 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 Division

The Compliance 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 education and 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. The division processes and maintains escrow licensing and security/bonding files to ensure compliance standards are met annually.

Compliance

Program 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 clients' trust account reconciliation reviews and identifying cases for investigation.

Education

The purpose of this program is to oversee the administration of 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, increase compliance and reduce regulatory violations. 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.

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. The Land Development manager is responsible for drafting of legislation and rules and acting as the Agency's coordinator.

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 purpose of OREA programs collectively 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 atmosphere.

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 or registration;
- 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.

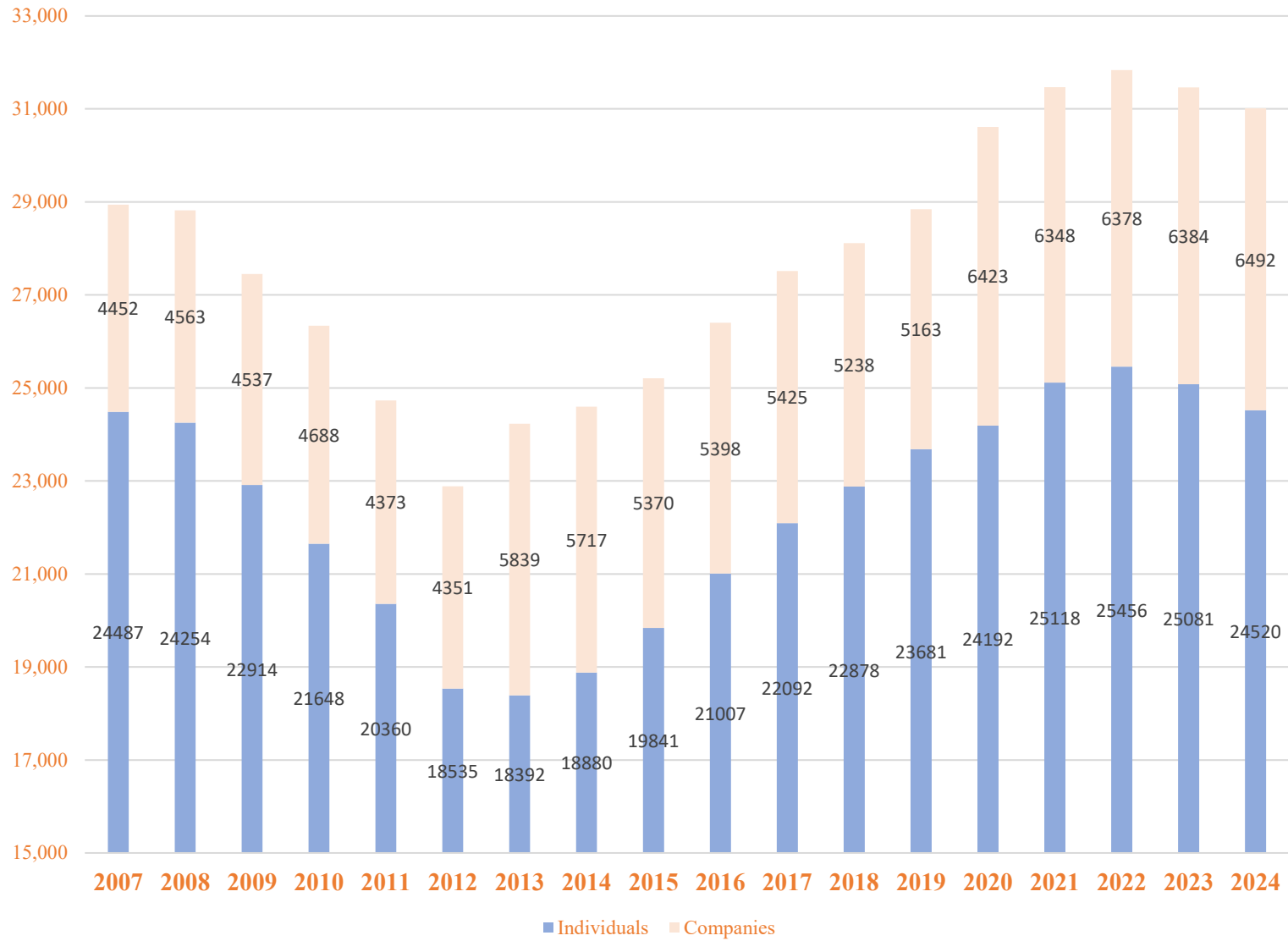
Expenditures

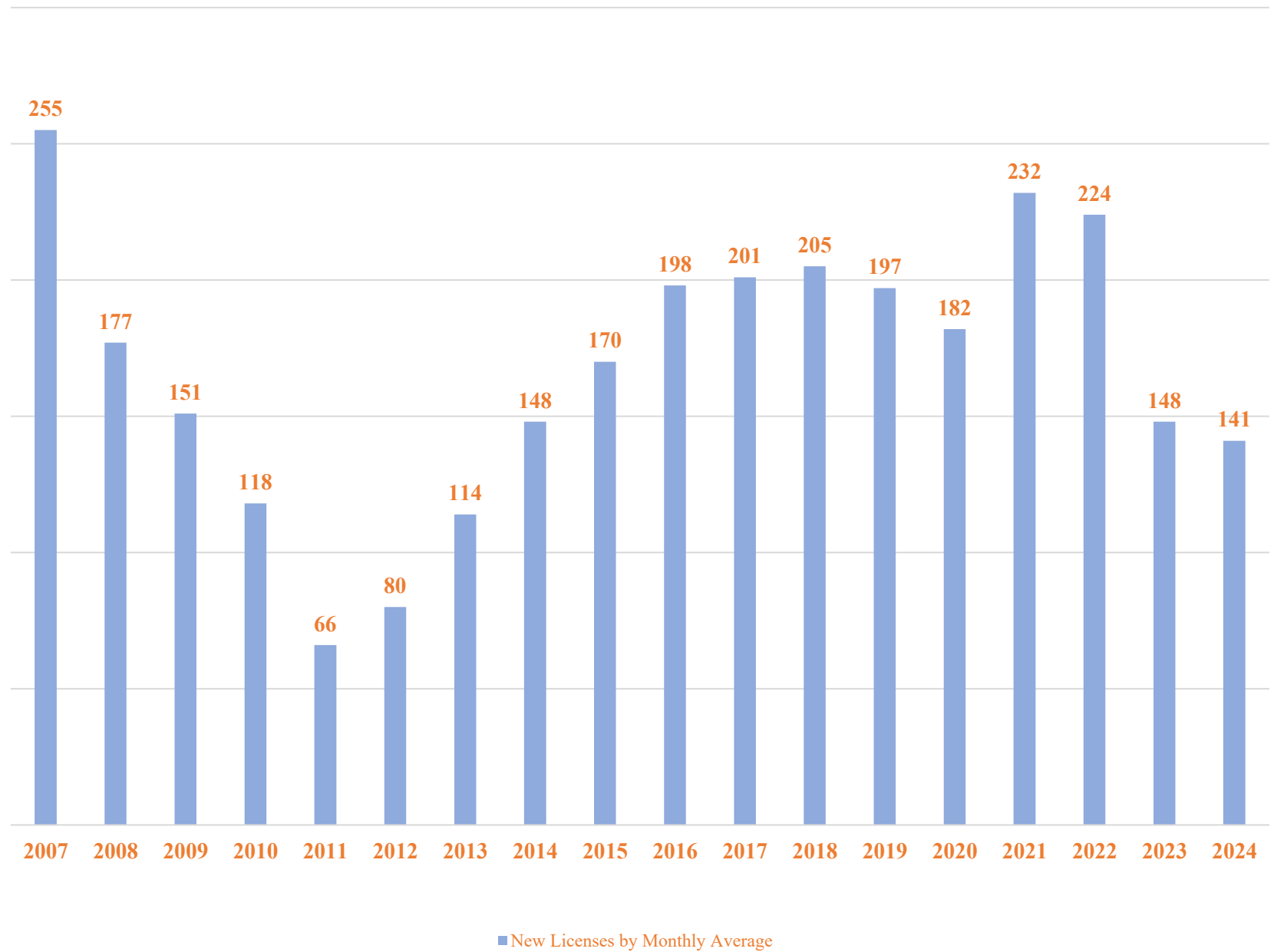
Other Funds expenditures in the Governor's Budget for 2025-2027 is \$ 15,734,253

FTE

Full time equivalent positions authorized by the agency's 2025-27 Governor's Budget is 32.00.

License Counts





Environmental Factors

Industry Environment*

Following employment rates and inflation, consumers look to housing as a primary factor in forming their personal economic outlook. In Oregon's supply constrained environment, the rapid increases to home prices from 2020-2022 have continued to hold unwaveringly. This, accompanied by interest rates at heights greater than in recent memory and beyond what consumers can afford, buyers are sitting it out and ultimately, the housing market sentiment in Oregon is at a low point. Anxiety looms in residential sales as well as the rental market where a lock in effect has taken shape. Many renters are not only postponing their entry into their first purchase but find themselves competing heavily for scarce affordability in the rental market as well. With an understanding that current conditions will limit potential buyers, sellers are delaying their own desired moves in favor of retaining equity. They are waiting for rates to turn and buyers to come back. This is demonstrated in the year over year data from the multiple listing service where listings are down 7.7% from 2023 to 2024 in the Portland Metro (inclusive of Washington and Clackamas County suburbs) with similar declines seen in Oregon's medium sized counties as well, where Lane County is experiencing a 9% decline in new listings and there is a 6.5% decline in Marion County, over the same period.

Lawrence Yun, Chief Economist at National Association of Realtors, is forecasting a break in the stalemate as we proceed into 2025. Yun suggests that the recent interest rate cuts will soon result in a modest reprieve in mortgage rates to around 6%, from 7%+ and indicates that this will spawn a surge in activity with 10% more sales transaction volume. Simultaneously he suggests that price increases will be more modest, resuming the historical standard of 2-3% year over year.

Despite current affordability barriers, Yun rejects the bursting bubble theory and disregards any suggestion that we are on a path to return to a 2008 Great Recession-like downturn. His argument rests chiefly on supply and demand. In 2008 there was an overabundance of supply while in today's market supply fails to meet demand. Secondly, he poses that high-risk sub-prime mortgages no longer threatens the market following the passage of The Dodd-Frank Act and greater regulation in the lending industry. Further, employment remains well above pre-pandemic rates and despite news alerts of high-profile corporate layoffs, jobs remain plentiful for most. To warrant a seismic housing market crash, economic conditions would need to substantially decline and even under recession circumstances, prices are unlikely to fall by 30% in the near term.

Regardless of sales indicators and economic conditions, OREA has seen a sizable decline in new license applications and a modest uptick in licensees allowing their license to lapse, rather than renew. This is continued from the previous budget cycle and suggests a considerable decline in licensing counts and thus reflects the overall sentiment that the real estate industry is experiencing challenges and may not be the most attractive occupation to enter, or remain in, at the moment.

*The information above comes from Inman, National Association of Realtors, RMLS, Oregon Office of Economic Analysis, New York Times and .

Administrative Environment

The passing of HB 4058 in the 2024 Legislative Session adds new regulatory oversight to the Agency's authority. Starting in July 2025 the Agency will be responsible for the administration of Wholesaler registration applications and renewals as well as the investigation of allegations of unregistered wholesaling activity and disclosure failures.

In addition, HB 4058 introduced the mandatory written buyer representation agreement, starting on January 1, 2025. The Agency has worked with industry and consumer partners to establish rules that outline the specifics of this agreement. The Agency has been communicating the new requirements with the regulated community. For further background regarding this legislation, see the Criteria for Budget Development section of this budget under Short Term Agency Plans.

Internal Environment

Staffing

OREA has successfully sustained the transition to hybrid remote work atmosphere for most Agency staff save reception and some licensing staff, which have full-time in office responsibilities. This change has broadened the Agency's talent pool and allowed for greater interest from qualified candidates in the Portland Metro area that had previously not considered positions with the Agency due to the long and expensive Salem commute. All managers are responsible for meeting with staff in one-on-one meetings monthly and hold Division meetings at least twice monthly. The Regulation, Compliance and Licensing Divisions meet in-person twice monthly for team meetings. The Agency holds monthly all staff meetings, gathering in the office quarterly for team building and training opportunities. Otherwise, team communication is supported through the monthly Agency newsletter, Teams chat and videoconference/phone.

Licensing 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.

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 2025-2027 biennium for this review process as needed. Work groups have historically included the Commissioner, OREA staff, Board members, educators, and industry/affinity group 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, for clear and concise language for implementing standards and regulation, delivering quality education and examination services, and developing Legislative Concepts.

	TOTALS			FUND TYPE				
	POS	FTE	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Non-limited Other
2023-25 LEGISLATIVELY ADOPTED BUDGET	34	34	13,996,881			9,768,489		
Salary Pot Adj			695,110					
2023-25 Emergency Board Actions			0			0		
2023-25 Legislatively Approved Budget	34	3	14,691,991			14,691,991		
Base Budget Adjustments:								
Net Cost of Position Actions:								
Administrative, Biennialized E-Board, Phase-Out	(1)	(1)	1,003,357			1,003,357		
Estimated Cost of Merit Increase								
Base Debt Service Adjustment								
Base Nonlimited Adjustment								
Capital Construction Adjustment								
Authorized FTE Increase/(Decrease)								
Subtotal: 2025-27 Base Budget	33	33	15,695,348			10,770,124		
Essential Packages:								
Package No. 010								
Temporary Appts., Overtime, Differential			912			912		
Other Payroll Expenses			(21,161)			(21,161)		
Vacancy Factor Increase/(Decrease)			74,318			74,318		
Subtotal			54,069			54,069		
Package No. 021/022								
021 - Phased-In Programs Excl. One-Time Costs			0					
022 - Phase-Out Programs and One-Time Costs			0					
Subtotal			0					

Package No. 030								
Standard Inflation: Cost of Goods & Services Increase/(Decrease)			303,583			303,583		
State Gov. Service Charges Increase/(Decrease)			338,518			338,518		
Subtotal			642,101			642,101		
Subtotal: 2025-27 Current Service Level	33	33	16,391,518			16,391,518		
Package No. 070 Revenue Shortfall	(1)	(1)	(719,280)			(719,280)		
Modified Current Service Level	31	31	15,672,238			15,791,518		
Policy Packages								
082 – September 2024 Emergency Board			0			0		
090 – Analyst Adjustments			207,976			207,976		
092 – Statewide AG Adjustment			(33,671)			(33,671)		
093 – Statewide Adjustment DAS Chgs			(112,290)			(112,290)		
100 – Wholesaler Registration Fee Establishment			0			0		
Subtotal Policy Packages			62,015			62,015		
Total 2025-27 Governor’s Budget	32	32	15,734,253			15,734,253		
Percent Change From 2023-25 Leg. Approved		-5.88%	7.09%	--%	--%	7.09%	--%	--%
Percent Change From Current Service Level		-3.03%	-4.01%	--%	--%	-4.01%	--%	--%

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 \$54,069, with \$7,552 Other Payroll Expenses, restores vacancy savings to \$0 with total vacancy savings factor of \$74,318 and reduces the Pension Obligation Bond by (27,801).

Total package is \$54,069 other funds.

2025-2027 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	-	-	708	-	-	-	708
Overtime Payments	-	-	131	-	-	-	131
All Other Differential	-	-	73	-	-	-	73
Public Employees' Retire Cont	-	-	43	-	-	-	43
Pension Obligation Bond	-	-	(27,801)	-	-	-	(27,801)
Social Security Taxes	-	-	70	-	-	-	70
Unemployment Assessments	-	-	18	-	-	-	18
Paid Family Medical Leave Insurance	-	-	1	-	-	-	1
Mass Transit Tax	-	-	6,508	-	-	-	6,508
Vacancy Savings	-	-	74,318	-	-	-	74,318
Total Personal Services	-	-	\$54,069	-	-	-	\$54,069
Total Expenditures							
Total Expenditures	-	-	54,069	-	-	-	54,069
Total Expenditures	-	-	\$54,069	-	-	-	\$54,069
Ending Balance							
Ending Balance	-	-	(54,069)	-	-	-	(54,069)
Total Ending Balance	-	-	(\$54,069)	-	-	-	(\$54,069)

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 \$558,101. This is based on the biennial general inflation factor which is applied to most Services and Supplies and non-PICS Personal Services costs for 2025-27 of 4.2%. The inflation factor for Professional Services accounts is 6.80%, Attorney General is 23.26%, State Government Service Charges was 51.16% with price list increases overall at 27.39%. OREA's state risk general liability assessment increased 3,658.77% (\$215,794) in 2023-2025 and again by 157.30% to \$555,224 in 2025-27, because 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.

2025-2027 Fiscal Impact

Fiscal Impact. Overall OREA's state government service charges have doubled. Despite a robust reserve these increased costs contributed to a revenue shortfall.

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	-	-	4,048	-	-	-	4,048
Out of State Travel	-	-	460	-	-	-	460
Employee Training	-	-	1,689	-	-	-	1,689
Office Expenses	-	-	2,478	-	-	-	2,478
Telecommunications	-	-	2,950	-	-	-	2,950
State Gov. Service Charges	-	-	338,518	-	-	-	338,518
Data Processing	-	-	4,989	-	-	-	4,989
Publicity and Publications	-	-	1,676	-	-	-	1,676
Professional Services	-	-	8,236	-	-	-	8,236
IT Professional Services	-	-	17,514	-	-	-	17,514
Attorney General	-	-	85,059	-	-	-	85,059
Employee Recruitment and Develop	-	-	354	-	-	-	354
Dues and Subscriptions	-	-	437	-	-	-	437
Facilities Rental and Taxes	-	-	11,622	-	-	-	11,622
Facilities Maintenance	-	-	206	-	-	-	206

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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	-	-	69,768	-	-	-	69,768
Other Services and Supplies	-	-	223	-	-	-	223
Expendable Prop 250 - 5000	-	-	1,330	-	-	-	1,330
IT Expendable Property	-	-	6,544	-	-	-	6,544
Total Services & Supplies	-	-	\$558,101	-	-	-	\$558,101
Capital Outlay							
Office Furniture and Fixtures	-	-	-	-	-	-	-
Data Processing Software	-	-	84,000	-	-	-	84,000
Total Capital Outlay	-	-	\$84,000	-	-	-	\$84,000
Total Expenditures							
Total Expenditures	-	-	642,101	-	-	-	642,101
Total Expenditures	-	-	\$642,101	-	-	-	\$642,101
Ending Balance							
Ending Balance	-	-	(642,101)	-	-	-	(642,101)
Total Ending Balance	-	-	(\$642,101)	-	-	-	(\$642,101)

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	-	-	69,768	-	-	-	69,768
Other Services and Supplies	-	-	223	-	-	-	223
Expendable Prop 250 - 5000	-	-	1,330	-	-	-	1,330
IT Expendable Property	-	-	6,544	-	-	-	6,544
Total Services & Supplies	-	-	\$558,101	-	-	-	\$558,101
Capital Outlay							
Office Furniture and Fixtures	-	-	-	-	-	-	-
Data Processing Software	-	-	84,000	-	-	-	84,000
Total Capital Outlay	-	-	\$84,000	-	-	-	\$84,000
Total Expenditures							
Total Expenditures	-	-	642,101	-	-	-	642,101
Total Expenditures	-	-	\$642,101	-	-	-	\$642,101
Ending Balance							
Ending Balance	-	-	(642,101)	-	-	-	(642,101)
Total Ending Balance	-	-	(\$642,101)	-	-	-	(\$642,101)

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070 Revenue Shortfall

Package Description

This package reduces Agency expenditures by \$642,101 to retain a three-month ending balance. This package will phase out one vacant position, hold one position vacant for the entirety of the biennium and reduce expenditures related to services and supplies.

2025-2027 Fiscal Impact

No Fiscal. The Agency will absorb these reductions with existing resources but may face impacts to performance related to holding the vacant position unfilled.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
Pkg: 070 - Revenue Shortfalls

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	-	-	(164,664)	-	-	-	(164,664)
Empl. Rel. Bd. Assessments	-	-	(72)	-	-	-	(72)
Public Employees' Retire Cont	-	-	(34,645)	-	-	-	(34,645)
Social Security Taxes	-	-	(12,597)	-	-	-	(12,597)
Paid Family Medical Leave Insurance	-	-	(659)	-	-	-	(659)
Worker's Comp. Assess. (WCD)	-	-	(42)	-	-	-	(42)
Flexible Benefits	-	-	(42,408)	-	-	-	(42,408)
Vacancy Savings	-	-	(250,305)	-	-	-	(250,305)
Total Personal Services	-	-	(\$505,392)	-	-	-	(\$505,392)
Services & Supplies							
Instate Travel	-	-	(48,192)	-	-	-	(48,192)
Publicity and Publications	-	-	(24,280)	-	-	-	(24,280)
Professional Services	-	-	(24,120)	-	-	-	(24,120)
IT Professional Services	-	-	(70,880)	-	-	-	(70,880)
IT Expendable Property	-	-	(46,416)	-	-	-	(46,416)
Total Services & Supplies	-	-	(\$213,888)	-	-	-	(\$213,888)
Total Expenditures							
Total Expenditures	-	-	(719,280)	-	-	-	(719,280)
Total Expenditures	-	-	(\$719,280)	-	-	-	(\$719,280)

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
Pkg: 070 - Revenue Shortfalls

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
Ending Balance							
Ending Balance	-	-	719,280	-	-	-	719,280
Total Ending Balance	-	-	\$719,280	-	-	-	\$719,280
Total Positions							
Total Positions							(1)
Total Positions	-	-	-	-	-	-	(1)
Total FTE							
Total FTE							(1.00)
Total FTE	-	-	-	-	-	-	(1.00)

090 Analyst Adjustments

Package Description

This package increases the Agency budget by \$207,976. The package reclassifies two positions and restores a deficit created by a data entry error from an internal technical budget process by \$157,336.

2025-2027 Fiscal Impact

No Fiscal Impact.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
Pkg: 090 - Analyst Adjustments

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

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	162,912	-	-	-	162,912
Empl. Rel. Bd. Assessments	-	-	-	-	-	-	-
Public Employees' Retire Cont	-	-	34,277	-	-	-	34,277
Social Security Taxes	-	-	10,302	-	-	-	10,302
Paid Family Medical Leave Insurance	-	-	512	-	-	-	512
Worker's Comp. Assess. (WCD)	-	-	-	-	-	-	-
Flexible Benefits	-	-	-	-	-	-	-
Reconciliation Adjustment	-	-	(27)	-	-	-	(27)
Total Personal Services	-	-	\$207,976	-	-	-	\$207,976
Total Expenditures							
Total Expenditures	-	-	207,976	-	-	-	207,976
Total Expenditures	-	-	\$207,976	-	-	-	\$207,976
Ending Balance							
Ending Balance	-	-	(207,976)	-	-	-	(207,976)
Total Ending Balance	-	-	(\$207,976)	-	-	-	(\$207,976)
Total Positions							
Total Positions	-	-	-	-	-	-	-
Total Positions	-	-	-	-	-	-	-

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
Pkg: 090 - Analyst Adjustments

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

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

092 Statewide AG Adjustment

Package Description

This package reflects a statewide adjustment made in Attorney General fees of (\$33,671)

2025-2027 Fiscal Impact

No Fiscal.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 092 - Statewide AG Adjustment

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

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Attorney General	-	-	(33,671)	-	-	-	(33,671)
Total Services & Supplies	-	-	(\$33,671)	-	-	-	(\$33,671)
Total Expenditures							
Total Expenditures	-	-	(33,671)	-	-	-	(33,671)
Total Expenditures	-	-	(\$33,671)	-	-	-	(\$33,671)
Ending Balance							
Ending Balance	-	-	33,671	-	-	-	33,671
Total Ending Balance	-	-	\$33,671	-	-	-	\$33,671

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093 Statewide Adjustment DAS Chgs

Package Description

This package reflects a statewide adjustment made in DAS Assessment charges of (\$112,290)

2025-2027 Fiscal Impact

No Fiscal.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 093 - Statewide Adjustment DAS Chgs

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

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
State Gov. Service Charges	-	-	(112,290)	-	-	-	(112,290)
Total Services & Supplies	-	-	(\$112,290)	-	-	-	(\$112,290)
Total Expenditures							
Total Expenditures	-	-	(112,290)	-	-	-	(112,290)
Total Expenditures	-	-	(\$112,290)	-	-	-	(\$112,290)
Ending Balance							
Ending Balance	-	-	112,290	-	-	-	112,290
Total Ending Balance	-	-	\$112,290	-	-	-	\$112,290

100 Wholesaler Registration Fee Establishment

Package Description

HB 2024 passed in the 2024 Legislative Session. This bill dictates a \$300 registration fee and a \$300 annual renewal fee to operate as a residential property wholesaler in Oregon. This bill sunrises on July 1, 2025 and requires legislative approval to be established in the 2025-27 biennium.

2025-2027 Revenue Impact

The Agency anticipates revenues up to \$15,000 related to this registration type in the upcoming biennium. This estimate is based on the assumption that approximately 25 individuals will register as a Wholesaler and renew once over the two year budget period.

2025-2027 Fiscal Impact

No Fiscal. The Agency does not anticipate significant cost to implement the new registration process nor expects there to be appreciable impact to case volume.

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Real Estate Agency
 Pkg: 100 - Wholesaler Registration - Fee Establishment

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
Revenues							
Business Lic and Fees	-	-	15,000	-	-	-	15,000
Total Revenues	-	-	\$15,000	-	-	-	\$15,000
Ending Balance							
Ending Balance	-	-	15,000	-	-	-	15,000
Total Ending Balance	-	-	\$15,000	-	-	-	\$15,000

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

Real Estate Agency
2025-27 Biennium

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

<i>Source</i>	2021-23 Actuals	2023-25 Leg Adopted Budget	2023-25 Leg Approved Budget	2025-27 Agency Request Budget	2025-27 Governor's Budget	2025-27 Leg. Adopted Budget
Other Funds						
Business Lic and Fees	10,946,626	10,492,779	11,187,889	10,542,900	10,542,900	-
Charges for Services	1,235	18,938	18,938	2,115	2,115	-
Fines and Forfeitures	360,315	490,824	490,824	503,861	503,861	-
Other Revenues	3,215	5,300	5,300	3,591	3,591	-
Transfer to General Fund	(68,927)	(64,500)	(64,500)	(68,938)	(68,938)	-
Total Other Funds	\$11,242,464	\$10,943,341	\$11,638,451	\$10,983,529	\$10,983,529	-

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

Real Estate Agency
2025-27 Biennium

Agency Number: 91900

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

<i>Source</i>	2021-23 Actuals	2023-25 Leg Adopted Budget	2023-25 Leg Approved Budget	2025-27 Agency Request Budget	2025-27 Governor's Budget	2025-27 Leg. Adopted Budget
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SPECIAL REPORTS





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.


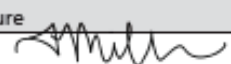
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<i>Jaden T Hurtienne</i>			6/2/2022

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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

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.

Information Technology Project Budget Spreadsheet - Ongoing Project >\$1,000,000

Effective Date: 3/13/2024							
e-License Project Budget & Funding Sources							
	2023	2024	2025	2026	2027	Total for Five Years	Funding Notes
e-License Project Funding							
Policy Option Package #101, Agency cash reserves							
POP #101 awarded 23-25, Agency cash reserves	\$ 2,307,803						Other Funds, 2023-2025 Legislative Session POP #101, Other Funds are Agency Cash Reserves, Authority Granted in Agency Budget by Legislature
e-License Project Related Operational Costs							
Staffing Costs Not Factored into Project Costs - Operational Funds							
State FTE / LD / Temp	\$ 40,892	\$ 40,892	\$ 40,892	\$ -	\$ -	\$ 122,676	Operational Funds, not tracked as part of the project budget. Estimated annual costs is at \$17,385 through 2023-2025. See POS tab for breakdown.
Other Related Costs - Operational Funds							
SaaS, Hosting, Cloud Services	\$ -	\$ 181,079	\$ 186,511	\$ 192,106	\$ 197,870	\$ 757,566	Operational Funds, increases 3% every subsequent maintenance period, not tracked as part of the project budget.
e-License Project Budget							
Contractor/Professional Services (S&S)							
DAS EIS Project Management Services	\$ -	\$ 67,560	\$ 50,670	\$ -	\$ -	\$ 118,230	
DAS Procurement Services	\$ -	\$ 30,000	\$ -	\$ -	\$ -	\$ 30,000	
Tyler Project Management Services	\$ -	\$ 41,349	\$ 41,349	\$ -	\$ -	\$ 82,698	
Tyler Training and Documentation	\$ -	\$ -	\$ 34,188	\$ -	\$ -	\$ 34,188	
Tyler Travel (4 Trips)	\$ -	\$ -	\$ 10,560	\$ -	\$ -	\$ 10,560	
DOJ Services	\$ -	\$ 3,000	\$ -	\$ -	\$ -	\$ 3,000	
No Infrastructure or ETS Costs							
Software Costs							
Software Installation	\$ -	\$ 130,977	\$ -	\$ -	\$ -	\$ 130,977	
Requirements Validation	\$ -	\$ 69,300	\$ -	\$ -	\$ -	\$ 69,300	
Project Enhancements	\$ -	\$ -	\$ 1,237,236	\$ -	\$ -	\$ 1,237,236	
Solution Configuration	\$ -	\$ -	\$ 165,580	\$ -	\$ -	\$ 165,580	
Data Migration	\$ -	\$ -	\$ 45,045	\$ -	\$ -	\$ 45,045	
User Acceptance Testing	\$ -	\$ -	\$ 107,646	\$ -	\$ -	\$ 107,646	
Implementation and Go-Live	\$ -	\$ -	\$ 28,644	\$ -	\$ -	\$ 28,644	
No Hardware Costs							
Contingency							
Contingency	\$ -	\$ 118,590	\$ 118,590	\$ 5,000	\$ 2,520	\$ 244,699	
Total Costs	\$0	\$460,776	\$1,839,508	\$5,000	\$2,520	\$2,307,803	
e-License Project Actual Expenditures							
Contractor/Professional Services (S&S)							
Project Management Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
DAS Procurement Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Tyler Project Management Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Tyler Training and Documentation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Tyler Travel (4 Trips)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
DOJ Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
No Infrastructure or ETS Costs							
Software Costs							
Software Installation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Requirements Validation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Project Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Solution Configuration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Data Migration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
User Acceptance Testing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Implementation and Go-Live	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
No Hardware Costs							
Other Costs							
Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Expenditures	\$0	\$0	\$0	\$0	\$0	\$0	
Total Remaining	\$0	\$460,776	\$1,839,508	\$5,000	\$2,520	\$2,307,803	

OREGON REAL ESTATE AGENCY

AFFIRMATIVE ACTION/DIVERSITY, EQUITY, AND INCLUSION PLAN
2025-2027





Oregon

Tina Kotek, Governor

Real Estate Agency

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July 31, 2024

Juliet Valdez

Affirmative Action Manager

Office of Cultural Change

juliet.o.valdez@das.oregon.gov

RE: 2025-2027 Affirmative Action Plan

The Oregon Real Estate Agency (OREA) is pleased to submit our 2025-2027 Affirmative Action/Diversity, Equity, and 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 to better serve the diverse citizens of Oregon.

Enclosed please find the updated Oregon Real Estate Agency Affirmative Action Plan for the 2025-20275 Biennium for your review and consideration.

If you have any questions or need additional information, please contact Mesheal Tracy, the Agency's AA/DEI Representative, at (971) 719-3544.

Steve Strode

Real Estate Commissioner

c: Mesheal Tracy, AA/DEI Representative
Anna Higley, Deputy Commissioner
Reba Dunnington, Client Agency HR Manager

OREGON REAL ESTATE AGENCY (OREA)
AFFIRMATIVE ACTION/DIVERSITY, EQUITY, AND
INCLUSION PLAN
 2025-2027 BIENNIUM

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AGENCY OVERVIEW

MISSION STATEMENT

The mission of the Oregon Real Estate Agency (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.

WHO WE ARE

The OREA is a stand-alone Executive Branch Agency of the State of Oregon charged with administering professional real estate licensing and regulating Oregon real estate license law ([ORS Chapter 696](#)). The Commissioner, who is appointed by the Governor and an employee of the state, directs the Agency. The Commissioner oversees the administration of the Agency and is responsible for assessing sanctions for license law violations.

The Oregon Real Estate Board is a nine-member advisory board. It has authority to waive some application requirements for real estate license and continuing education provider applicants, and to advise the Governor, Commissioner, and Agency on law, rule, and policy.

WE VALUE:

- Equity
- Respect
- Transparency
- Adaptability & Innovation
- Stewardship & Customer Service
- Accountability

OUR STRATEGIC GOALS:

- Ensure equity in the application of laws and rules.
- Increase accessibility and reduce barriers in licensing and information to consumers.
- Improve operational efficiency.

OUR GUIDING PRINCIPLES:

- **Regulatory Effectiveness (Appropriateness and Adaptability to Change)**
We regulate from a perspective of consumer and licensee impact. We are dedicated to adaptability as real estate practice evolves. In collaboration with our stakeholders, 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 (Equity & Transparency)**
We believe that equity is foundational to our purpose. 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 and thoughtful manner.

- **Professionalism (Customer Service Excellence, Accountability & Respect)**

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

REPRESENTATIVES AND CONTACTS

OREGON REAL ESTATE COMMISSIONER

Steve Strobe

530 Center St. NE, Suite 100, Salem, OR 97301

971-301-0822

steve.strobe@rea.oregon.gov

OREGON REAL ESTATE DEPUTY COMMISSIONER

Anna Higley

530 Center St. NE, Suite 100, Salem, OR 97301

971-719-0348

anna.higley@rea.oregon.gov

GOVERNOR'S POLICY ADVISOR

Jody Christensen

503-559-0382

jody.christensen@oregon.gov

AFFIRMATIVE ACTION REPRESENTATIVE/TRIBAL LIAISON/DIVERSITY & INCLUSION OFFICER

Mesheal Tracy, Administrative Services Manager

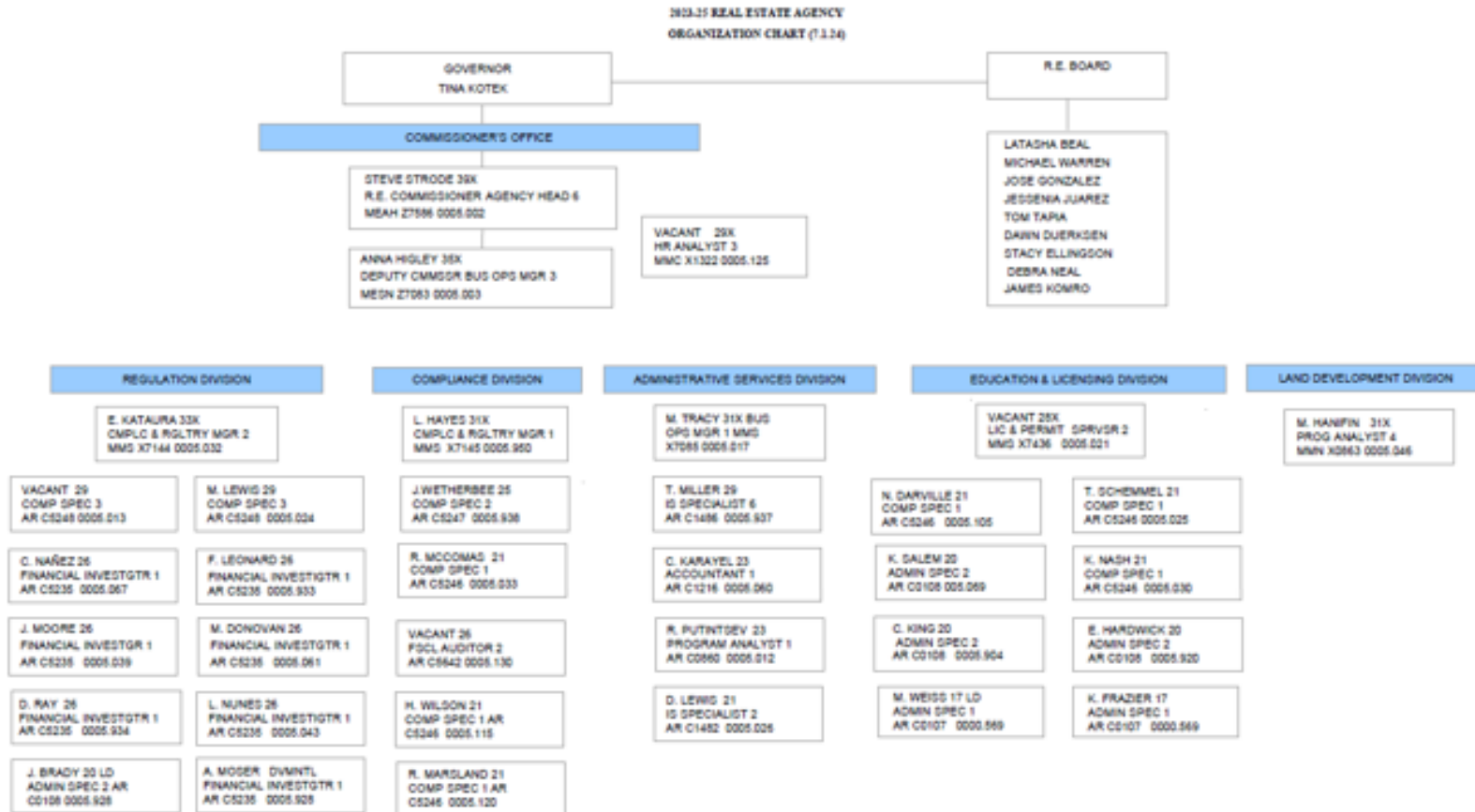
530 Center St. NE, Suite 100 Salem, OR 97301

971-719-3544

mesheal.l.tracy@rea.oregon.gov

ORGANIZATIONAL CHART

OREA is an agency of thirty-four (34 FTE) staff primarily composed of professional and managerial personnel specializing in real estate regulation, compliance, licensing, and education. Twenty-nine (29) of the thirty-four positions are at salary range 21 or above. Five (5) positions are classified as administrative specialist/support at salary ranges 17-20.



POLICY STATEMENTS

OREA AFFIRMATIVE ACTION STATEMENT

The Oregon Real Estate Agency (OREA) is committed to fostering diversity, equity, and inclusion (DEI) across all facets of our operations. We believe a diverse workforce and inclusive environment are fundamental to effectively serving Oregon's diverse communities.

OREA values a diverse, inclusive environment where all employees and customers, irrespective of gender, age, race, national origin, color, ethnicity, religion, disability, sexual orientation, veteran status, or other protected status, receive fair and equitable treatment. We are dedicated to recruiting applicants who reflect the rich diversity of Oregon.

We maintain a work environment that is positive, respectful, safe, and free from all forms of harassment and discrimination. Management is committed to promptly addressing any reported incidents and ensuring a supportive environment for all employees. All applicants and staff are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

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

OREA makes every reasonable effort to accommodate individuals with disabilities in accordance with statutory requirements.

We ask that employees join us in striving to create and maintain a positive work environment for themselves and their co-workers, reinforcing our commitment to Affirmative Action and DEI goals for a diverse and inclusive workforce.

OREA DIVERSITY, EQUITY & INCLUSION STATEMENT

OREA strives to develop and maintain a diverse and inclusive organizational culture that mirrors the diversity of Oregon's population. Our commitment to fairness and equitable treatment extends to all individuals we engage with, whether employees, clients, or stakeholders.

As our work impacts all Oregonians and involves collaboration across various state agencies, legislative bodies, professional organizations, licensee stakeholders, and the public, we acknowledge and actively address systemic barriers that may hinder our DEI goals. OREA is dedicated to identifying and implementing effective solutions that enhance our agency's performance and service delivery, ensuring equitable outcomes for all.

OREA leverages DEI principles to foster a workplace that is not only stronger and better functioning but also more innovative and dynamic. By embracing diverse perspectives, we enhance our problem-solving capabilities and improve our ability to serve the diverse needs of our employees and customers alike.

We remain committed to continuous improvement in our DEI initiatives, seeking feedback and collaboration from our employees, stakeholders, and community partners. Together, we strive to create an environment where every individual feels valued, respected, and empowered to contribute their best.

ROLES FOR PLAN IMPLEMENTATION

DIRECTORS/ADMINISTRATORS

The Commissioner's Office is comprised of the Commissioner (Agency Head), Deputy (Designee/Administrator) and Communications & DEI Director. The Commissioner's Office sets the Agency's policies concerning equal employment opportunity processes, Affirmative Action and Diversity, Equity and Inclusion. Executive leadership holds responsibility for compliance with policy and achievement of these goals to which the Agency is committed. 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:

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

AFFIRMATIVE ACTION/DEI REPRESENTATIVE

The target date for hiring the Communications & DEI Director is September 1, 2024. This role operates from within the Commissioner's offices and provides a full range of policy analysis, communication, and diversity, equity, and inclusion services to OREA management, employees, and external partners. This position is dedicated to driving stronger engagement and opening lines of communication.

This role is responsible to:

- Disseminate information through training and management consultation.
- Review personnel practices to identify barriers to equal employment and upward mobility opportunities and recommend any changes in programs and procedures designed to eliminate discriminatory practices.
- Advise the Commissioner of the preparation of equal employment opportunity programs, procedures, regulations, reports, and the Agency plans.
- Monitor progress toward goals.
- Assure that Agency recruitments are carried out in compliance with AA and EEO goals and help managers with efforts to meet Affirmative Action recruitment goals and outreach efforts.
- Monitor recruitment processes and evaluate employment policies and practices to ensure there is equal opportunity for protected class individuals.
- Develop or contract training for staff on cultural competency.

- Communicate internal complaint procedure regarding discrimination to all employees and proceed promptly with fair and unbiased investigations.
- Conduct periodic reviews to ensure that all facilities are accessible to disabled employees and customers.
- Maintain a welcoming environment for employees by modeling and promoting an environment of respect and sensitivity to individuals.
- Attend the Governor's Office of Diversity & Inclusion/Affirmative Action related trainings and workshops.
- Establish, prioritize, and promote Diversity, Equity, Inclusion, and Belonging and Affirmative Action initiatives, internally and externally.

AGENCY HUMAN RESOURCES MANAGER

The Human Resources Manager is responsible for meeting with all new employees to 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)*
- [Violence-Free Workplace](#) *(Applies to all employees except where in conflict with CBA, includes temporary employees and volunteers)*

2023-2025 PROGRESS REPORT NARRATIVE

GOAL 1: FOSTER DIVERSITY AND INCLUSION IN STAKEHOLDER ENGAGEMENT, REDUCE BARRIERS TO ENTRY

In alignment with our goal to foster diversity and inclusion in stakeholder engagement and reduce barriers to entry, OREA has expanded its focus beyond workforce development to actively engage with Oregon's diverse communities. We have identified and reached out to DEI-centered professional organizations in the real estate sector.

The Commissioner's office has attended meetings and special events in the past year, fostering relationships with the members of these organizations. We've also invited representatives from these groups to participate in workgroups and policy discussions, enriching our decision-making processes with diverse perspectives.

To ensure diverse representation at all levels, OREA leadership actively encourages members of these organizations to attend the Oregon Real Estate Board meetings and apply for Board positions. Since implementing this strategy, we've seen a 33% increase in diversity on the Board.

While we have made significant progress, challenges remain, particularly in recruiting for dedicated bilingual positions. As an interim measure, we're leveraging the skills of our existing bilingual Financial Investigator. This staff member receives differential pay to assist colleagues in communicating with Spanish-speaking members of the public. Moving forward, we plan to expand our recruitment channels to target bilingual candidates more effectively and develop partnerships with organizations serving bilingual professionals.

GOAL 2: INCREASE REPRESENTATION OF DIVERSE EMPLOYEES

Over the past year, OREA has made strides in our efforts to increase the representation of diverse employees. This goal remains a cornerstone of our commitment to better reflect and serve the diverse population of Oregon, enhancing our cultural competence and improving our service delivery to all Oregonians.

In our ongoing efforts to foster a diverse and inclusive workforce, we now include language on all job descriptions that addresses the well-documented phenomenon of self-selection bias in job applications. Our postings explicitly state that research has shown women and individuals from other underrepresented groups often hesitate to apply for positions unless they meet 100% of the listed desired attributes. To counter this, we've added encouraging language that invites all qualified candidates to apply, even if they don't meet every single desired attribute.

Additionally, OREA has expanded its recruitment efforts by advertising open positions with Partners in Diversity. This allows us to reach a wider pool of qualified candidates beyond those who rely solely on the state's job page."

We have seen an increase in staff diversity from 17.2% to 20.6% since implementation.

OREA continues to encourage 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 the survey prior to their last day.

While we're heartened by this progress, we recognize that fostering a truly diverse and inclusive workplace is an ongoing process, and we remain committed to continual improvement in this area.

GOAL 3: IMPROVE THE CULTURE OF INCLUSION

OREA continues in our efforts to improve the culture of inclusion within our agency. This goal is crucial for creating an environment where all employees feel valued, respected, and empowered to contribute their best work.

Employee engagement has been at the forefront of our efforts. We have strived to feature DEI-focused articles in our monthly Employee Newsletter and to bring in guest speakers on DEI-centered topics for All Staff Meetings.

We've also updated all management position descriptions to explicitly include responsibilities related to Affirmative Action and DEI. These responsibilities are a key component of performance evaluations for management staff as required by Oregon Revised Statute 659A.012. This has led to more intentional DEI efforts from our leadership team, increasing awareness of their role in fostering an inclusive environment.

Although we have made progress, creating a truly inclusive culture is an ongoing journey. We've faced challenges, particularly in maintaining momentum and engagement amid busy work schedules. To address this, we are aiming to hire a Communications and DEI Director this year. This role is responsible for establishing, prioritizing, and promoting Diversity, Equity, Inclusion, and Belonging and Affirmative Action initiatives internally and externally. This position is dedicated to driving stronger engagement and opening lines of communication.

2023-2025 PROGRESS REPORT

GOAL 1: FOSTER DIVERSITY AND INCLUSION IN STAKEHOLDER ENGAGEMENT, REDUCE BARRIERS TO ENTRY

<i>Number</i>	<i>Strategy</i>	<i>Owner</i>	<i>Status</i>	<i>Implementation target</i>
1.1	Model and demonstrate inclusion <ul style="list-style-type: none"> • Establish stakeholder workgroups made up of a diverse group of stakeholders • Join Realtor Diversity Committee 	Commissioner's Office	CO CO	September 2021
1.2	Update license applications to collect demographic licensee data to share with industry partners.	Management Team	IP	February 2022, Delayed for New System Launch to 2026 to ensure privacy related to demographic data.
1.3	Implement services in languages other than English <ul style="list-style-type: none"> • Dedicate 1-2 positions as Bilingual with pay differential • Deploy a Spanish language real estate exam 	Management Team Lic. & Ed. Manager	CO IP	July 2021 June 2023, Delayed, to be requirement in exam vendor RFP set for 2025
1.4	Establish a regulatory framework which applies an equity lens	Regs. Manager	IP	December 2022

GOAL 2: INCREASE REPRESENTATION OF DIVERSE EMPLOYEES

<i>Number</i>	<i>Strategy</i>	<i>Owner</i>	<i>Status</i>	<i>Implementation Target</i>
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2.1	Increase diversity in recruitment pipeline <ul style="list-style-type: none"> Conduct targeted advertising for recruitments 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

GOAL 3: IMPROVE THE CULTURE OF INCLUSION

<i>Number</i>	<i>Strategy</i>	<i>Owner</i>	<i>Status</i>	<i>Implementation Target</i>
3.1	Engage with employees about diversity and inclusion matters and progress toward goals <ul style="list-style-type: none"> Articles in Employee Newsletter Share DEI Agency Network info Schedule AA speakers/trainings at REA All Staff meetings Encourage staff participation in DEI-centered training 	Admin Svcs. Manager AA/DEI Rep. AA/DEI Rep. Management Team	CO CO CO CO	Ongoing Ongoing Ongoing Ongoing
3.2	Measure the current culture of inclusion by surveying staff on 2022 DEI related activities	HR Rep. & AA/DEI Rep.	N	January 2023
3.3	Executive leadership to monitor and act on diversity and inclusion efforts.	Commissioner's Office, HR & AA/DEI Representative	CO	Ongoing Monthly

3.4	Update Agency management position descriptions to include responsibilities related to Affirmative Action and Diversity, Equity & Inclusion and include as part of performance evaluations of management staff.	Commissioner's Office	CO	March 2022
3.5	Evaluate the Agency's on-boarding experience to make a more inclusive process	Admin Services Manager	IP	March 2025

Key: IP=In Progress CO=Complete & Ongoing CC=Completed & Closed N=Not Completed



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.

The Agency also supports managers seeking a certificate in public management from Willamette University and promotes participation in a cohort of Leadership Oregon.

EXECUTIVE ORDER 22-11

OREA understands that this order is intended to guide agencies, and the State of Oregon, in the promotion of Diversity, Equity, and Inclusion in the workplace and the elimination of the past and present effects of discrimination. To this effect, the agency has applied the order in the following ways:

- The commissioner provides support and upholds the principles of affirmative action and diversity, equity, and inclusion. This is demonstrated by working with stakeholder groups, including participation in the Oregon Realtors Diversity Committee, directing the implementation of the agency's affirmative action plan, and serving on the Fair Housing Committee of the Association of Real Estate License Law Officials
- The agency incorporates affirmative action, diversity, equity, and inclusion responsibilities in executive and management job descriptions.
- OREA lists affirmative action resources within its AA/DEI Plan.
- The agency posts the agency's affirmative action plan policy statement and diversity, equity, and inclusion statement on the agency's external website and announces to staff the location of the document.
- OREA reports any discrimination or harassment claims and findings biennially in the AA/DEI plan.
- Evaluations of each manager's performance include their effectiveness in achieving the affirmative action objectives of the agency.

OREA is still working on applying the following directives of the order:

When the agency adopts new systems, OREA will ensure that the system is accessible and easy to interact with. As improvements to existing systems are available, the agency intends to evaluate enhancements for accessibility and support of a diverse, equitable, and inclusive workforce.

OREA is currently in the beginning stages of a project to upgrade the licensing and regulatory software for the 2023-2025 biennium. We intend the new system to improve user experience and integrate our regulatory framework model.

CONTRACTORS/VENDORS

The agency provides vendors with a link to this 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 this plan.

STATUS OF CONTRACTS TO MINORITY BUSINESS (ORS 659A.015)

The agency budget is generally limited for new contract awards.

The DPO works to resource businesses identified by the Certification Office for Business Inclusion and Diversity (COBID) as a Minority and/or Women Business Enterprise.

STATUS OF CONTRACTS TO MINORITY BUSINESSES (As of June 30, 2024)	
AGENCY TOTAL CONTRACT BUDGET (DOLLARS)	\$59,000
AGENCY TOTAL NEW CONTRACTS IN CURRENT BIENNIUM (DOLLARS)	\$0.00
TOTAL NUMBER OF CONTRACTS	14
TOTAL NUMBER OF CONTRACTS WITH COBID FIRMS	0
TOTAL CONTRACT DOLLARS SPENT ON COBID CONTRACTS	\$0.00
CONTRACT COUNTS BY COBID QUALIFICATION	
Minority/Women Business Enterprise	0
Emerging Small Business	0
Service-Disabled Veteran	0
Disadvantaged Business Enterprise	0

WORKFORCE REPRESENTATION BY JOB CLASSIFICATION

OREA employees are categorized into three Equal Employment Opportunity tiers— Officials & Managers, Professionals, and Administrative Support. The Agency exceeds state goals for women in all categories.

As of June 2023, Agency employed five people of color and one person with a disability. OREA typically has moderate turnover due to Agency size, therefore there are limited hiring opportunities. The Agency's diversity metrics compare favorably to the statewide representation goals and is above parity with women and near parity with people of color.

- 100% of lead workers are women
- 67% of officials & managers are women
- 65% of all employees are women
- 18% of employees are people of color
- 17% of officials & managers are LGBTQ+
- 7% of employees are veterans
- 3% of employees disclosed that they have a disability

PROGRESS MADE OR LOST SINCE PREVIOUS BIENNIUM

Through June 30, 2023, OREA has maintained representation across all areas.

The agency continues to prioritize the need to promote diversity in management. All recruitments were updated 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. Statistically, women and minorities are less likely to apply for a position that has some reach attributes. OREA finds it important to actively solicit those individuals in an attempt to overcome this barrier.

STRATEGY AND GOALS JULY 1, 2025 – JUNE 30, 2027

The Agency recognizes that the cultivation of a diverse, equitable, and inclusive environment is an ongoing process that requires sustained effort and dedication. As such, we will build upon the progress achieved in the previous biennium, refining our approaches where necessary and implementing new strategies as appropriate to further advance these objectives. This continuity of purpose underscores our commitment to creating an Agency that reflects and serves the diverse population of Oregon.

GOAL 1: ENHANCE DIVERSITY AND INCLUSION IN STAKEHOLDER ENGAGEMENT

Building on our success, we will continue fostering relationships with DEI-centered organizations and real estate industry affinity groups. Using these connections, we will expand our reach to ensure even greater diversity in our stakeholder engagement.

OBJECTIVES

1. Effect an increase in diverse representation on workgroups.
2. Establish membership and relationships with a minimum of three affinity groups within the real estate sector.

GOAL 2: INCREASE REPRESENTATION WITHIN THE AGENCY'S WORKFORCE

OREA shall build upon previously successful initiatives to attract diverse talent through the refinement of recruitment methodologies, expansion of outreach efforts, and the creation of viable pathways for underrepresented demographic groups to enter and advance within the Agency.

OBJECTIVE

1. Reinstate and expand the student worker program, with a goal of a minimum of 25% of positions to be occupied by students from underrepresented demographic groups.
2. Investigate ways to partner with larger state agencies to leverage their existing mentorship programs for OREA employees.
3. Consult with CHRO Agency HR Manager to determine Enhance and optimize the exit interview process to acquire more comprehensive insights into retention challenges faced by diverse employees.

GOAL 3: IMPROVE THE CULTURE OF INCLUSION

With the forthcoming integration of a Communications and DEI Director, OREA shall intensify efforts to embed DEI principles comprehensively within the organizational culture, thereby ensuring all employees experience a sense of value, respect, and empowerment.

- Develop and execute a comprehensive DEI communication strategy in alignment with Agency objectives.
- Facilitate DEI training for all management personnel, with particular emphasis on inclusive leadership practices.
- Investigate the ability to support an employee resource group program to provide support for diverse employees and allies.

APPENDIX A- AFFIRMATIVE ACTION RESOURCES

All have the right to file grievances or complaints of discrimination with the Bureau of Labor and Industries, the Equal Employment Opportunity Commission, or in accordance with the collective bargaining agreement.

OREGON BUREAU OF LABOR AND INDUSTRIES - CIVIL RIGHTS DIVISION

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

PORTLAND

800 NE Oregon Street, MS# 32, Suite 1070, Portland, OR 97232
English: 971-673-0764
Spanish: 971-673-2818
Fax: 971-673-0765
crdemail@boli.state.or.us

EUGENE

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

SALEM

3865 Wolverine Street N, Bldg. E, Suite 1, Salem, OR 97305-1268
503-378-3292

U.S. EQUAL EMPLOYMENT OPPORTUNITY COMMISSION

Seattle Field Office
Federal Office Building 909 First Avenue, Suite 400, Seattle, WA 98104-1061
800-669-4000

The EEOC does not maintain an office in Oregon. The Seattle Field Office is open Monday- Friday from 8:00 a.m. - 4:30 p.m.

APPENDIX B – STATE POLICY DOCUMENTATION

- [ADA and Reasonable Accommodation in Employment Policy \(Statewide Policy 50.020.10\)](#)
- [Discrimination and Harassment Free Workplace - \(Statewide Policy No. 50.010.01\)](#)
- [Veterans Preference in Employment \(ORS 408.230\)](#)
- [Equal Opportunity and Affirmative Action Rule \(OAR 105-040-0001\)](#)
- Executive Orders [05-01](#), [08-18](#), [16-09](#), [17-11](#), and [22-11](#)

APPENDIX C – FEDERAL DOCUMENTATION

- [Age Discrimination in Employment Act of 1967](#)
- [Americans With Disabilities Act of 1990](#)
- [Equal Pay Act of 1963 – 29 USC Chapter 8 Section 206](#)
- [Title VII of the Civil Rights Act of 1964 - 42 USC Chapter 411](#)
- [Genetic Information Nondiscrimination Act of 2008 \(GINA\)](#)
- [Title VII of the Civil Rights Act of 1964](#)
 - National Origin Discrimination
 - Pregnancy Discrimination
 - Race/Color Discrimination
 - Religious Discrimination
 - Sex-Based Discrimination
 - Sexual Harassment Title VII
- [Prohibition on Retaliation](#)

Real Estate Agency

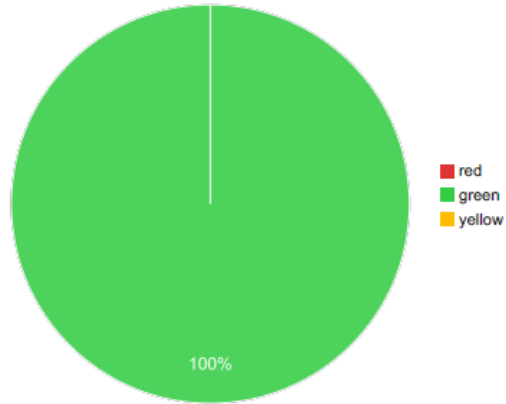
Annual Performance Progress Report

Reporting Year 2024

Published: 9/30/2024 3:48:57 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.

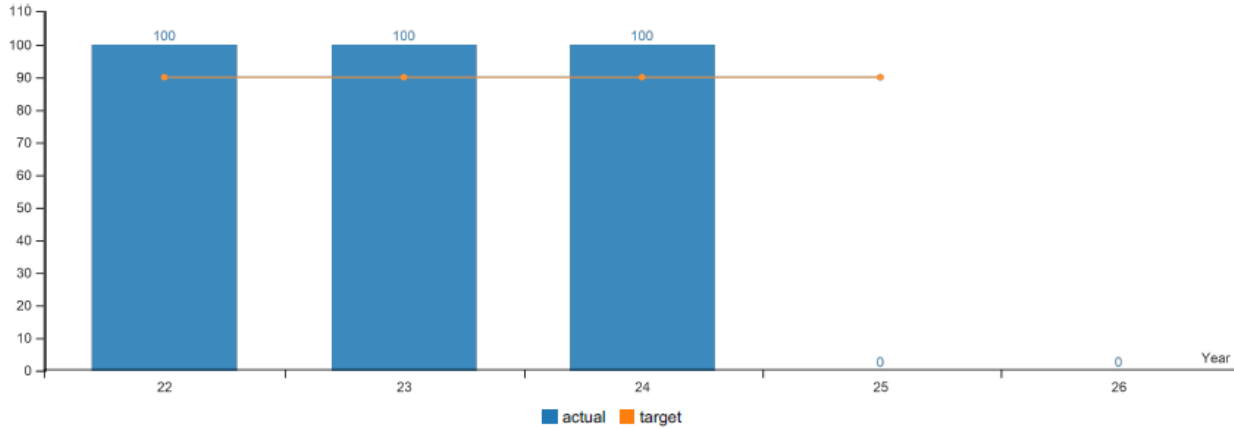
Proposal	Proposed Key Performance Measures (KPMs)
Delete	Contested Case Actions resolved through settlement - Percent of contested case actions that are resolved through informal settlement resolution and prior to a formal hearing before the Office of Administrative Hearings.
New	Case Actions resolved through settlement - Percent of case actions that are resolved through informal settlement resolution and without formal hearing before the Office of Administrative Hearings.



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	2022	2023	2024	2025	2026
Compliance Rate Achieved					
Actual	100%	100%	100%		
Target	90%	90%	90%	90%	

How Are We Doing

100% of Property managers and principal brokers continue to meet compliance within 45 days of completing an Agency administered compliance review.

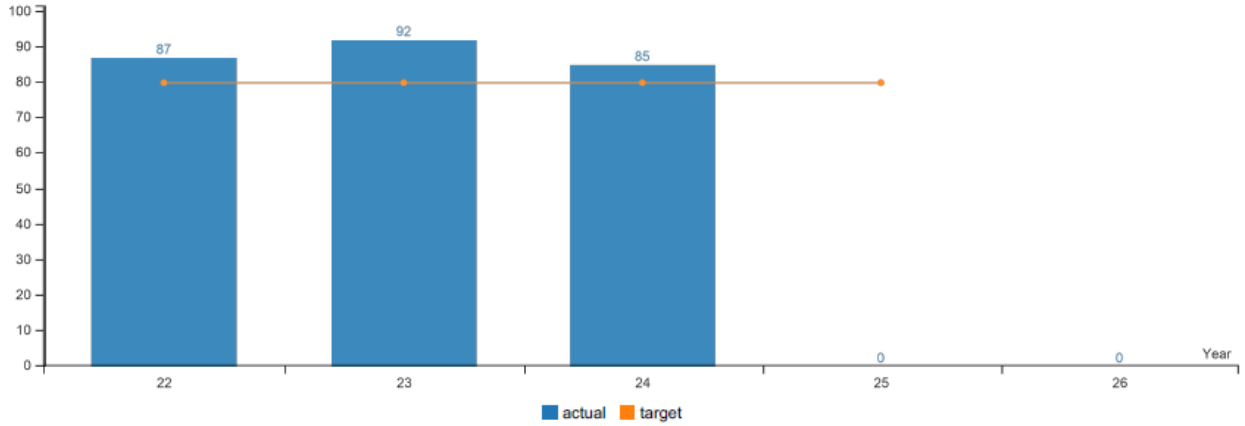
This program provides a voluntary opportunity for licensees to submit practice related materials for an evaluation of compliance against Agency law and rule. In taking advantage of this program licensees can operate with greater confidence that the business processes observed by the Agency are in accordance with regulatory expectations. Thus, lowering the opportunity that the licensee's everyday business systems and procedures will lead to a licensing law violation.

Factors Affecting Results

The compliance review program is voluntary with licensees being issued continuing education toward their biennial renewal requirement for participating in the process. In doing so, participants tend to be among the most proactive and risk concerned. Licensees engaging in this program rarely have severe compliance issues and most items identified in the review are minor and can be quickly resolved. As has been noted in OREA's previous APPR submission, it is our intention to implement a mandatory compliance review process in the 2023-2025 biennium for new licensees in a broker supervisory or property management role. In doing so, we anticipate that with a wider net of participants, the program will be more effective and better serve its intended purpose though the performance will very likely decline for a period. However, in this case it will result in a greater impact which is preferable to continuing to exceed a target alone.

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	2022	2023	2024	2025	2026
Percent of cases investigated within 150 days of receipt of complaint					
Actual	87%	92%	85%		
Target	80%	80%	80%	80%	

How Are We Doing

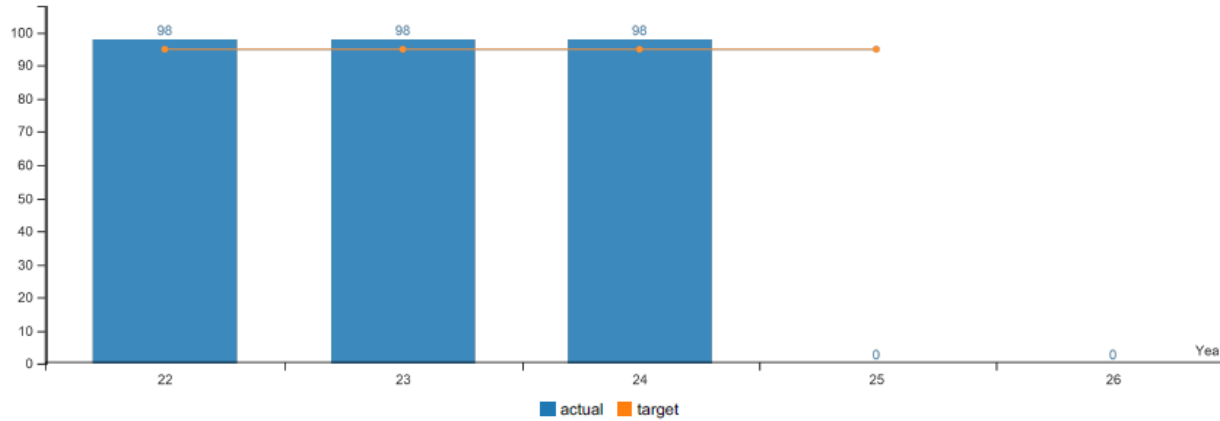
Over the 2024 reporting period, 85% of cases were completed within 150 days of receipt. The Agency is just exceeding the 80% target, demonstrating that staffing levels given current case volume are appropriate.

Factors Affecting Results

Through the 2019-2021 and 2021-2023 biennia, the Agency instituted a series of new processes and methods within the Regulation Division, to ensure continuous quality management of case investigations. Such measures included targeted internal processing metrics, bimonthly team and investigator case load production reporting, strategic case planning tasks with dedicated oversight, case prioritization based on impact rather than on date of receipt exclusively, and mandatory management touch points as cases exceeded benchmarked expectations in days to complete. These new procedures were implemented to ensure that matters are handled in the most appropriate and effective manner and that all cases are handled uniformly. While markedly improving case management performance, the newly introduced oversight and increased accountability measures initiated a shift in the operational dynamics and culture of the team. As a result, the division did experience a slightly higher than average turnover rate in the last few years. Over the most recent reporting period, the team welcomed three new investigators who were undergoing training and not yet operating at full capacity. As new team members gain experience and long-standing employees continue to adapt to new expectations, it is anticipated that performance will continue to improve, assuming similar caseloads.

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	2022	2023	2024	2025	2026
Percent of Contested Case Actions Resolved Before a Formal Hearing					
Actual	98%	98%	98%		
Target	95%	95%	95%	95%	

How Are We Doing

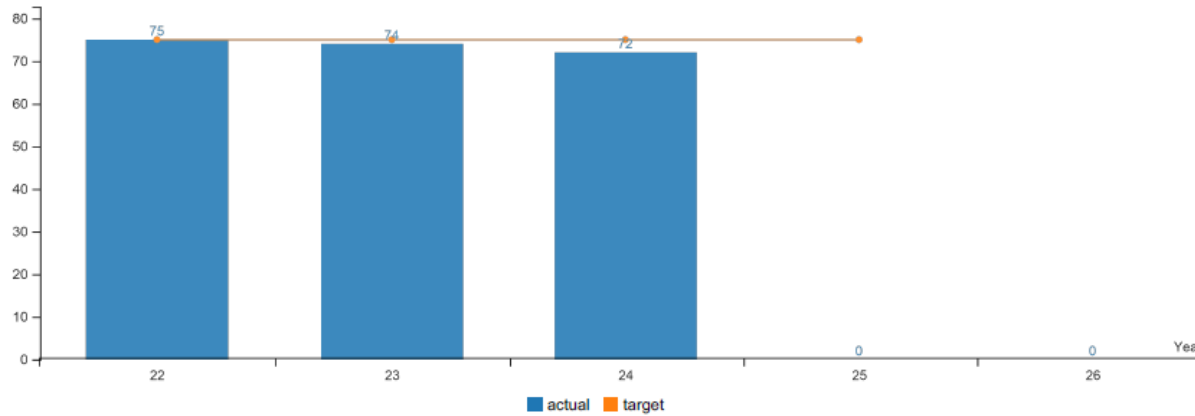
The Agency continues to exceed the expectation that 95% of case actions are resolved through settlement with 98% avoiding the formal hearing process, in the most recent reporting period.

Factors Affecting Results

All respondents with matters having proposed administrative action are presented with the opportunity to meet with regulatory leadership and the case investigator assigned for an informal settlement conference. In advance of the scheduled meeting, the respondent is provided with the complete investigation report and presented with the intended sanction. The respondent is free to bring legal counsel though the discussion is focused on allowing for new evidence to be brought that hadn't otherwise been considered or to provide mitigating information, not yet captured. The Agency finds that this open and transparent approach supports an equitable outcome. Since the respondent can digest the findings in advance and then has the opportunity to dialogue with the Agency, there is full understanding of the regulatory and investigative process as well as the rationale used by the Agency in assessing the proposed sanction, leading to the Agency continuing to meet this metric.

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	2022	2023	2024	2025	2026
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	75%	74%	72%		
Target	75%	75%	75%	75%	

How Are We Doing

72% of licensees surveyed rated the exam as "good" or "excellent" as an effective screen for competent and ethical professionals, slightly falling short of the 75% target. Over the past several reporting periods, this rating has been within a few percentage points of target but slightly out of reach of the goal.

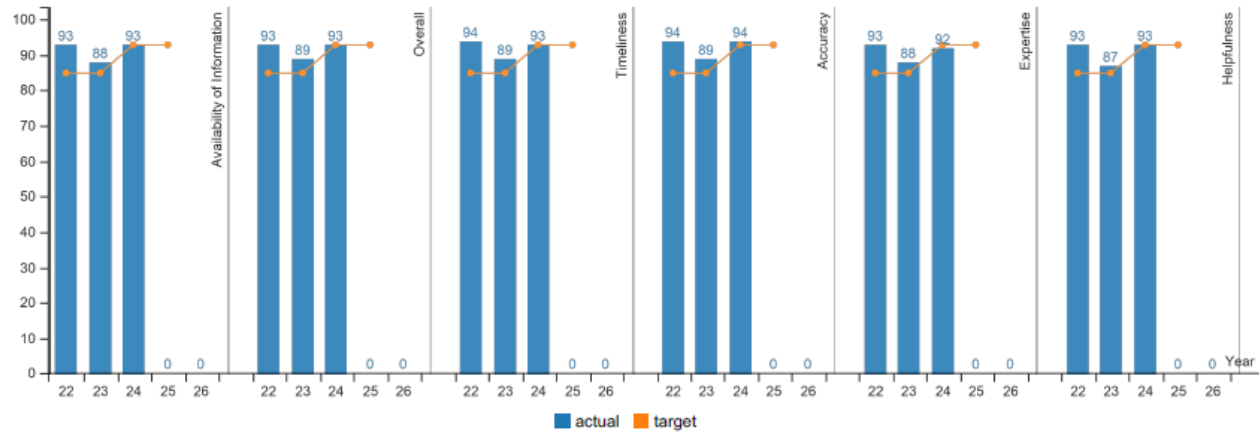
Factors Affecting Results

While the question is directed to evaluate the exam as a screen for competency and ethics, many responses focus on the experience of the applicant in the testing process and their evaluation of the exam proctor or the value the exam provided in their ability to perform in the real estate sales environment.

Complaints related to the exam vendor include issues related to the physical testing environment, general proctor customer service and technical problems experienced while participating in a remote online examination. These concerns then have a negative resultant impact on the performance of the KPM itself as respondents seek an opportunity to vent frustrations. To overcome this issue the Agency intends to expand the questionnaire to allow the respondent to outline problems experienced in the testing process separate from this KPM. Additionally, the Agency's contract with the exam vendor is nearing term and the Agency intends to conduct an open request for proposal bidding process in the next biennium. As part of that contracting effort, the Agency will be seeking to score vendors on matters of frequent customer complaint, such as customer service.

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	2022	2023	2024	2025	2026
Availability of Information					
Actual	93%	88%	93%		
Target	85%	85%	93%	93%	
Overall					
Actual	93%	89%	93%		
Target	85%	85%	93%	93%	
Timeliness					
Actual	94%	89%	93%		
Target	85%	85%	93%	93%	
Accuracy					
Actual	94%	89%	94%		
Target	85%	85%	93%	93%	
Expertise					
Actual	93%	88%	92%		
Target	85%	85%	93%	93%	
Helpfulness					
Actual	93%	87%	93%		
Target	85%	85%	93%	93%	

How Are We Doing

The Oregon Real Estate Agency has prioritized excellence in customer service for the last several years. Licensees have come to expect, and members of the public appreciate, an exacting level of accuracy from highly knowledgeable Agency staff in a timely manner. OREA has been, and remains, committed to providing live answer to phone call inquiry from the public and licensees, which results in high regard and an outstanding customer service rating from survey respondents.

Following several years of exceeding the customer service KPM targets, the Oregon Legislature identified a reach goal of 93% for customer service in all categories: overall, accuracy, availability of information, expertise, helpfulness, and timeliness. This target appears to be among the, or perhaps the, highest for customer service ratings among all state agencies and we are pleased to have largely met that expectation.

Factors Affecting Results

Customers typically experience a hold time of fewer than 30 seconds when contacting the Agency. All emails are acknowledged as soon as possible with the target response time of one business day. The Agency recognizes that the needs of the customer are valid, and we value the opportunity to assist them in whatever their needs are, from assisting an applicant through an online application process to helping a member of the public complete an online complaint, and even redirecting a caller whose needs are outside of the Agency to their next stop, another state Agency or outside resource, when we can identify one.

Staff are provided with regular training on customer service and management continually coaches and supports to maintain the culture of excellence in service delivery to the public.

Real Estate Agency

**Summary Cross Reference Listing and Packages
2025-27 Biennium**

**Agency Number: 91900
M Analyst: Vellaipandian, Harikrishnan
Budget Coordinator: Higley, Anna - (971)719-0348**

<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	040	0	Mandated Caseload	Essential Packages
050-00-00-00000	Real Estate Agency	050	0	Fundshifts	Essential Packages
050-00-00-00000	Real Estate Agency	060	0	Technical Adjustments	Essential Packages
050-00-00-00000	Real Estate Agency	070	0	Revenue Shortfalls	Policy Packages
050-00-00-00000	Real Estate Agency	081	0	May 2024 Emergency Board	Policy Packages
050-00-00-00000	Real Estate Agency	082	0	September 2024 Emergency Board	Policy Packages
050-00-00-00000	Real Estate Agency	090	0	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	100	0	Wholesaler Registration - Fee Establishment	Policy Packages

Real Estate Agency

**Policy Package List by Priority
2025-27 Biennium**

Agency Number: 91900

BAM Analyst: Vellaipandian, Harikrishnan

Budget Coordinator: Higley, Anna - (971)719-0348

<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	May 2024 Emergency Board	050-00-00-00000	Real Estate Agency
	082	September 2024 Emergency Board	050-00-00-00000	Real Estate Agency
	090	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
	100	Wholesaler Registration - Fee Establishment	050-00-00-00000	Real Estate Agency

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2025-27 Biennium

Real Estate Agency

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	5,511,735	6,796,808	6,796,808	6,796,808	6,796,808	-
REVENUE CATEGORIES						
LICENSES AND FEES						
0205 Business Lic and Fees						
3400 Other Funds Ltd	10,946,626	10,492,779	11,187,889	10,542,900	10,542,900	-
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	1,235	18,938	18,938	2,115	2,115	-
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3400 Other Funds Ltd	291,388	426,324	426,324	434,923	434,923	-
8800 General Fund Revenue	68,927	64,500	64,500	68,938	68,938	-
All Funds	360,315	490,824	490,824	503,861	503,861	-
OTHER						
0975 Other Revenues						
3400 Other Funds Ltd	3,215	5,300	5,300	3,591	3,591	-
REVENUE CATEGORIES						
3400 Other Funds Ltd	11,242,464	10,943,341	11,638,451	10,983,529	10,983,529	-
8800 General Fund Revenue	68,927	64,500	64,500	68,938	68,938	-
TOTAL REVENUE CATEGORIES	\$11,311,391	\$11,007,841	\$11,702,951	\$11,052,467	\$11,052,467	-

TRANSFERS OUT

Real Estate Agency

Agency Number: 91900

**Budget Support - Detail Revenues and Expenditures
2025-27 Biennium
Real Estate Agency**

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

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
2060 Transfer to General Fund						
8800 General Fund Revenue	(68,927)	(64,500)	(64,500)	(68,938)	(68,938)	-
AVAILABLE REVENUES						
3400 Other Funds Ltd	16,754,199	17,740,149	18,435,259	17,780,337	17,780,337	-
TOTAL AVAILABLE REVENUES	\$16,754,199	\$17,740,149	\$18,435,259	\$17,780,337	\$17,780,337	-
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	4,709,709	5,632,464	5,632,464	5,974,824	6,233,280	-
3160 Temporary Appointments						
3400 Other Funds Ltd	14,015	16,849	16,849	17,557	17,557	-
3170 Overtime Payments						
3400 Other Funds Ltd	2,932	3,116	3,116	3,247	3,247	-
3190 All Other Differential						
3400 Other Funds Ltd	45,860	1,735	1,735	1,808	1,808	-
SALARIES & WAGES						
3400 Other Funds Ltd	4,772,516	5,654,164	5,654,164	5,997,436	6,255,892	-
TOTAL SALARIES & WAGES	\$4,772,516	\$5,654,164	\$5,654,164	\$5,997,436	\$6,255,892	-
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	1,558	1,802	1,802	2,232	2,304	-
3220 Public Employees' Retire Cont						

Real Estate Agency

Agency Number: 91900

**Budget Support - Detail Revenues and Expenditures
2025-27 Biennium
Real Estate Agency**

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

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
3400 Other Funds Ltd	839,817	1,009,045	1,009,045	1,256,806	1,311,186	-
3221 Pension Obligation Bond						
3400 Other Funds Ltd	259,513	272,499	272,499	244,698	244,698	-
3230 Social Security Taxes						
3400 Other Funds Ltd	361,734	428,037	428,037	453,912	471,523	-
3240 Unemployment Assessments						
3400 Other Funds Ltd	5,500	435	435	453	453	-
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	5,446	22,049	22,049	23,577	24,471	-
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	1,105	1,564	1,564	1,302	1,344	-
3260 Mass Transit Tax						
3400 Other Funds Ltd	28,566	31,038	31,038	37,546	37,546	-
3270 Flexible Benefits						
3400 Other Funds Ltd	1,087,099	1,346,400	1,346,400	1,314,648	1,357,056	-
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	2,590,338	3,112,869	3,112,869	3,335,174	3,450,581	-
TOTAL OTHER PAYROLL EXPENSES	\$2,590,338	\$3,112,869	\$3,112,869	\$3,335,174	\$3,450,581	-
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	-	(74,318)	(74,318)	(130,861)	(250,305)	-
3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	3,416	3,416	-	(27)	-

Real Estate Agency

Agency Number: 91900

**Budget Support - Detail Revenues and Expenditures
2025-27 Biennium
Real Estate Agency**

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

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	(70,902)	(70,902)	(130,861)	(250,332)	-
TOTAL P.S. BUDGET ADJUSTMENTS	-	(\$70,902)	(\$70,902)	(\$130,861)	(\$250,332)	-
PERSONAL SERVICES						
3400 Other Funds Ltd	7,362,854	8,696,131	8,696,131	9,201,749	9,456,141	-
TOTAL PERSONAL SERVICES	\$7,362,854	\$8,696,131	\$8,696,131	\$9,201,749	\$9,456,141	-
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	16,083	96,384	96,384	52,240	52,240	-
4125 Out of State Travel						
3400 Other Funds Ltd	23,922	10,950	10,950	11,410	11,410	-
4150 Employee Training						
3400 Other Funds Ltd	46,106	40,206	40,206	41,895	41,895	-
4175 Office Expenses						
3400 Other Funds Ltd	156,889	58,989	58,989	61,467	61,467	-
4200 Telecommunications						
3400 Other Funds Ltd	70,673	70,231	70,231	73,181	73,181	-
4225 State Gov. Service Charges						
3400 Other Funds Ltd	383,520	661,687	661,687	1,000,205	887,915	-
4250 Data Processing						
3400 Other Funds Ltd	97,868	118,785	118,785	123,774	123,774	-
4275 Publicity and Publications						
3400 Other Funds Ltd	4,539	39,905	39,905	41,581	17,301	-

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2025-27 Biennium

Real Estate Agency

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
4300 Professional Services						
3400 Other Funds Ltd	76,773	121,117	121,117	129,353	105,233	-
4315 IT Professional Services						
3400 Other Funds Ltd	121,380	257,554	257,554	275,068	204,188	-
4325 Attorney General						
3400 Other Funds Ltd	304,308	365,688	365,688	450,747	417,076	-
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	-	8,420	8,420	8,774	8,774	-
4400 Dues and Subscriptions						
3400 Other Funds Ltd	8,901	10,406	10,406	10,843	10,843	-
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	250,789	276,712	276,712	288,334	288,334	-
4475 Facilities Maintenance						
3400 Other Funds Ltd	8,453	4,911	4,911	5,117	5,117	-
4575 Agency Program Related S and S						
3400 Other Funds Ltd	744,836	966,023	1,661,133	1,730,901	1,730,901	-
4650 Other Services and Supplies						
3400 Other Funds Ltd	188,847	5,301	5,301	5,524	5,524	-
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	6,211	31,678	31,678	33,008	33,008	-
4715 IT Expendable Property						
3400 Other Funds Ltd	41,269	155,803	155,803	162,347	115,931	-
SERVICES & SUPPLIES						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
 2025-27 Biennium
 Real Estate Agency

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

Description	2021-23 Actuals	2023-25 Leg Adopted Budget	2023-25 Leg Approved Budget	2025-27 Agency Request Budget	2025-27 Governor's Budget	2025-27 Leg. Adopted Budget
3400 Other Funds Ltd	2,551,367	3,300,750	3,995,860	4,505,769	4,194,112	-
TOTAL SERVICES & SUPPLIES	\$2,551,367	\$3,300,750	\$3,995,860	\$4,505,769	\$4,194,112	-
CAPITAL OUTLAY						
5550 Data Processing Software						
3400 Other Funds Ltd	-	2,000,000	2,000,000	2,084,000	2,084,000	-
EXPENDITURES						
3400 Other Funds Ltd	9,914,221	13,996,881	14,691,991	15,791,518	15,734,253	-
TOTAL EXPENDITURES	\$9,914,221	\$13,996,881	\$14,691,991	\$15,791,518	\$15,734,253	-
ENDING BALANCE						
3400 Other Funds Ltd	6,839,978	3,743,268	3,743,268	1,988,819	2,046,084	-
TOTAL ENDING BALANCE	\$6,839,978	\$3,743,268	\$3,743,268	\$1,988,819	\$2,046,084	-
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	31	34	34	31	32	-
TOTAL AUTHORIZED POSITIONS	31	34	34	31	32	-
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	30.50	34.00	34.00	31.00	32.00	-
TOTAL AUTHORIZED FTE	30.50	34.00	34.00	31.00	32.00	-

Real Estate Agency

Agency Number: 91900

**Budget Support - Detail Revenues and Expenditures
2025-27 Biennium
Real Estate Agency**

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

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
BEGINNING BALANCE						
0025 Beginning Balance						
3400 Other Funds Ltd	5,511,735	6,796,808	6,796,808	6,796,808	6,796,808	-
REVENUE CATEGORIES						
LICENSES AND FEES						
0205 Business Lic and Fees						
3400 Other Funds Ltd	10,946,626	10,492,779	11,187,889	10,542,900	10,542,900	-
CHARGES FOR SERVICES						
0410 Charges for Services						
3400 Other Funds Ltd	1,235	18,938	18,938	2,115	2,115	-
FINES, RENTS AND ROYALTIES						
0505 Fines and Forfeitures						
3400 Other Funds Ltd	291,388	426,324	426,324	434,923	434,923	-
8800 General Fund Revenue	68,927	64,500	64,500	68,938	68,938	-
All Funds	360,315	490,824	490,824	503,861	503,861	-
OTHER						
0975 Other Revenues						
3400 Other Funds Ltd	3,215	5,300	5,300	3,591	3,591	-
REVENUE CATEGORIES						
3400 Other Funds Ltd	11,242,464	10,943,341	11,638,451	10,983,529	10,983,529	-
8800 General Fund Revenue	68,927	64,500	64,500	68,938	68,938	-
TOTAL REVENUE CATEGORIES	\$11,311,391	\$11,007,841	\$11,702,951	\$11,052,467	\$11,052,467	-

TRANSFERS OUT

Budget Support - Detail Revenues and Expenditures
 2025-27 Biennium
 Real Estate Agency

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

Description	2021-23 Actuals	2023-25 Leg Adopted Budget	2023-25 Leg Approved Budget	2025-27 Agency Request Budget	2025-27 Governor's Budget	2025-27 Leg. Adopted Budget
2060 Transfer to General Fund						
8800 General Fund Revenue	(68,927)	(64,500)	(64,500)	(68,938)	(68,938)	-
AVAILABLE REVENUES						
3400 Other Funds Ltd	16,754,199	17,740,149	18,435,259	17,780,337	17,780,337	-
TOTAL AVAILABLE REVENUES	\$16,754,199	\$17,740,149	\$18,435,259	\$17,780,337	\$17,780,337	-
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
3400 Other Funds Ltd	4,709,709	5,632,464	5,632,464	5,974,824	6,233,280	-
3160 Temporary Appointments						
3400 Other Funds Ltd	14,015	16,849	16,849	17,557	17,557	-
3170 Overtime Payments						
3400 Other Funds Ltd	2,932	3,116	3,116	3,247	3,247	-
3190 All Other Differential						
3400 Other Funds Ltd	45,860	1,735	1,735	1,808	1,808	-
SALARIES & WAGES						
3400 Other Funds Ltd	4,772,516	5,654,164	5,654,164	5,997,436	6,255,892	-
TOTAL SALARIES & WAGES	\$4,772,516	\$5,654,164	\$5,654,164	\$5,997,436	\$6,255,892	-
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
3400 Other Funds Ltd	1,558	1,802	1,802	2,232	2,304	-
3220 Public Employees' Retire Cont						

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
 2025-27 Biennium
 Real Estate Agency

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

Description	2021-23 Actuals	2023-25 Leg Adopted Budget	2023-25 Leg Approved Budget	2025-27 Agency Request Budget	2025-27 Governor's Budget	2025-27 Leg. Adopted Budget
3400 Other Funds Ltd	839,817	1,009,045	1,009,045	1,256,806	1,311,186	-
3221 Pension Obligation Bond						
3400 Other Funds Ltd	259,513	272,499	272,499	244,698	244,698	-
3230 Social Security Taxes						
3400 Other Funds Ltd	361,734	428,037	428,037	453,912	471,523	-
3240 Unemployment Assessments						
3400 Other Funds Ltd	5,500	435	435	453	453	-
3241 Paid Family Medical Leave Insurance						
3400 Other Funds Ltd	5,446	22,049	22,049	23,577	24,471	-
3250 Worker's Comp. Assess. (WCD)						
3400 Other Funds Ltd	1,105	1,564	1,564	1,302	1,344	-
3260 Mass Transit Tax						
3400 Other Funds Ltd	28,566	31,038	31,038	37,546	37,546	-
3270 Flexible Benefits						
3400 Other Funds Ltd	1,087,099	1,346,400	1,346,400	1,314,648	1,357,056	-
OTHER PAYROLL EXPENSES						
3400 Other Funds Ltd	2,590,338	3,112,869	3,112,869	3,335,174	3,450,581	-
TOTAL OTHER PAYROLL EXPENSES	\$2,590,338	\$3,112,869	\$3,112,869	\$3,335,174	\$3,450,581	-
P.S. BUDGET ADJUSTMENTS						
3455 Vacancy Savings						
3400 Other Funds Ltd	-	(74,318)	(74,318)	(130,861)	(250,305)	-
3465 Reconciliation Adjustment						
3400 Other Funds Ltd	-	3,416	3,416	-	(27)	-

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures
2025-27 Biennium
Real Estate Agency

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

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
P.S. BUDGET ADJUSTMENTS						
3400 Other Funds Ltd	-	(70,902)	(70,902)	(130,861)	(250,332)	-
TOTAL P.S. BUDGET ADJUSTMENTS	-	(\$70,902)	(\$70,902)	(\$130,861)	(\$250,332)	-
PERSONAL SERVICES						
3400 Other Funds Ltd	7,362,854	8,696,131	8,696,131	9,201,749	9,456,141	-
TOTAL PERSONAL SERVICES	\$7,362,854	\$8,696,131	\$8,696,131	\$9,201,749	\$9,456,141	-
SERVICES & SUPPLIES						
4100 Instate Travel						
3400 Other Funds Ltd	16,083	96,384	96,384	52,240	52,240	-
4125 Out of State Travel						
3400 Other Funds Ltd	23,922	10,950	10,950	11,410	11,410	-
4150 Employee Training						
3400 Other Funds Ltd	46,106	40,206	40,206	41,895	41,895	-
4175 Office Expenses						
3400 Other Funds Ltd	156,889	58,989	58,989	61,467	61,467	-
4200 Telecommunications						
3400 Other Funds Ltd	70,673	70,231	70,231	73,181	73,181	-
4225 State Gov. Service Charges						
3400 Other Funds Ltd	383,520	661,687	661,687	1,000,205	887,915	-
4250 Data Processing						
3400 Other Funds Ltd	97,868	118,785	118,785	123,774	123,774	-
4275 Publicity and Publications						
3400 Other Funds Ltd	4,539	39,905	39,905	41,581	17,301	-

Real Estate Agency

Agency Number: 91900

Budget Support - Detail Revenues and Expenditures

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

2025-27 Biennium

Real Estate Agency

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
4300 Professional Services						
3400 Other Funds Ltd	76,773	121,117	121,117	129,353	105,233	-
4315 IT Professional Services						
3400 Other Funds Ltd	121,380	257,554	257,554	275,068	204,188	-
4325 Attorney General						
3400 Other Funds Ltd	304,308	365,688	365,688	450,747	417,076	-
4375 Employee Recruitment and Develop						
3400 Other Funds Ltd	-	8,420	8,420	8,774	8,774	-
4400 Dues and Subscriptions						
3400 Other Funds Ltd	8,901	10,406	10,406	10,843	10,843	-
4425 Facilities Rental and Taxes						
3400 Other Funds Ltd	250,789	276,712	276,712	288,334	288,334	-
4475 Facilities Maintenance						
3400 Other Funds Ltd	8,453	4,911	4,911	5,117	5,117	-
4575 Agency Program Related S and S						
3400 Other Funds Ltd	744,836	966,023	1,661,133	1,730,901	1,730,901	-
4650 Other Services and Supplies						
3400 Other Funds Ltd	188,847	5,301	5,301	5,524	5,524	-
4700 Expendable Prop 250 - 5000						
3400 Other Funds Ltd	6,211	31,678	31,678	33,008	33,008	-
4715 IT Expendable Property						
3400 Other Funds Ltd	41,269	155,803	155,803	162,347	115,931	-
SERVICES & SUPPLIES						

Real Estate Agency

Agency Number: 91900

**Budget Support - Detail Revenues and Expenditures
2025-27 Biennium
Real Estate Agency**

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

<i>Description</i>	<i>2021-23 Actuals</i>	<i>2023-25 Leg Adopted Budget</i>	<i>2023-25 Leg Approved Budget</i>	<i>2025-27 Agency Request Budget</i>	<i>2025-27 Governor's Budget</i>	<i>2025-27 Leg. Adopted Budget</i>
3400 Other Funds Ltd	2,551,367	3,300,750	3,995,860	4,505,769	4,194,112	-
TOTAL SERVICES & SUPPLIES	\$2,551,367	\$3,300,750	\$3,995,860	\$4,505,769	\$4,194,112	-
CAPITAL OUTLAY						
5550 Data Processing Software						
3400 Other Funds Ltd	-	2,000,000	2,000,000	2,084,000	2,084,000	-
EXPENDITURES						
3400 Other Funds Ltd	9,914,221	13,996,881	14,691,991	15,791,518	15,734,253	-
TOTAL EXPENDITURES	\$9,914,221	\$13,996,881	\$14,691,991	\$15,791,518	\$15,734,253	-
ENDING BALANCE						
3400 Other Funds Ltd	6,839,978	3,743,268	3,743,268	1,988,819	2,046,084	-
TOTAL ENDING BALANCE	\$6,839,978	\$3,743,268	\$3,743,268	\$1,988,819	\$2,046,084	-
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	31	34	34	31	32	-
TOTAL AUTHORIZED POSITIONS	31	34	34	31	32	-
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	30.50	34.00	34.00	31.00	32.00	-
TOTAL AUTHORIZED FTE	30.50	34.00	34.00	31.00	32.00	-

Real Estate Agency

Agency Number: 91900

Version / Column Comparison Report - Detail

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

2025-27 Biennium

Real Estate Agency

Description	Agency Request Budget (V-01) 2025-27 Base Budget	Governor's Budget (Y-01) 2025-27 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	10,527,900	10,527,900	0	-
CHARGES FOR SERVICES				
0410 Charges for Services				
3400 Other Funds Ltd	2,115	2,115	0	-
FINES, RENTS AND ROYALTIES				
0505 Fines and Forfeitures				
3400 Other Funds Ltd	434,923	434,923	0	-
8800 General Fund Revenue	68,938	68,938	0	-
All Funds	503,861	503,861	0	-
OTHER				
0975 Other Revenues				
3400 Other Funds Ltd	3,591	3,591	0	-
TOTAL REVENUES				
3400 Other Funds Ltd	10,968,529	10,968,529	0	-
8800 General Fund Revenue	68,938	68,938	0	-
TOTAL REVENUES	\$11,037,467	\$11,037,467	0	-

TRANSFERS OUT
2060 Transfer to General Fund

Description	Agency Request Budget (V-01) 2025-27 Base Budget	Governor's Budget (Y-01) 2025-27 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
8800 General Fund Revenue	(68,938)	(68,938)	0	-
AVAILABLE REVENUES				
3400 Other Funds Ltd	17,765,337	17,765,337	0	-
EXPENDITURES				
PERSONAL SERVICES				
SALARIES & WAGES				
3110 Class/Unclass Sal. and Per Diem				
3400 Other Funds Ltd	6,235,032	6,235,032	0	-
3160 Temporary Appointments				
3400 Other Funds Ltd	16,849	16,849	0	-
3170 Overtime Payments				
3400 Other Funds Ltd	3,116	3,116	0	-
3190 All Other Differential				
3400 Other Funds Ltd	1,735	1,735	0	-
TOTAL SALARIES & WAGES				
3400 Other Funds Ltd	6,256,732	6,256,732	0	-
OTHER PAYROLL EXPENSES				
3210 Empl. Rel. Bd. Assessments				
3400 Other Funds Ltd	2,376	2,376	0	-
3220 Public Employees' Retire Cont				
3400 Other Funds Ltd	1,311,511	1,311,511	0	-
3221 Pension Obligation Bond				
3400 Other Funds Ltd	272,499	272,499	0	-
3230 Social Security Taxes				

Description	Agency Request Budget (V-01) 2025-27 Base Budget	Governor's Budget (Y-01) 2025-27 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	473,748	473,748	0	-
3240 Unemployment Assessments				
3400 Other Funds Ltd	435	435	0	-
3241 Paid Family Medical Leave Insurance				
3400 Other Funds Ltd	24,617	24,617	0	-
3250 Worker's Comp. Assess. (WCD)				
3400 Other Funds Ltd	1,386	1,386	0	-
3260 Mass Transit Tax				
3400 Other Funds Ltd	31,038	31,038	0	-
3270 Flexible Benefits				
3400 Other Funds Ltd	1,399,464	1,399,464	0	-
TOTAL OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	3,517,074	3,517,074	0	-
P.S. BUDGET ADJUSTMENTS				
3455 Vacancy Savings				
3400 Other Funds Ltd	(74,318)	(74,318)	0	-
TOTAL PERSONAL SERVICES				
3400 Other Funds Ltd	9,699,488	9,699,488	0	-
SERVICES & SUPPLIES				
4100 Instate Travel				
3400 Other Funds Ltd	96,384	96,384	0	-
4125 Out of State Travel				
3400 Other Funds Ltd	10,950	10,950	0	-
4150 Employee Training				

Description	Agency Request Budget (V-01) 2025-27 Base Budget	Governor's Budget (Y-01) 2025-27 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	40,206	40,206	0	-
4175 Office Expenses				
3400 Other Funds Ltd	58,989	58,989	0	-
4200 Telecommunications				
3400 Other Funds Ltd	70,231	70,231	0	-
4225 State Gov. Service Charges				
3400 Other Funds Ltd	661,687	661,687	0	-
4250 Data Processing				
3400 Other Funds Ltd	118,785	118,785	0	-
4275 Publicity and Publications				
3400 Other Funds Ltd	39,905	39,905	0	-
4300 Professional Services				
3400 Other Funds Ltd	121,117	121,117	0	-
4315 IT Professional Services				
3400 Other Funds Ltd	257,554	257,554	0	-
4325 Attorney General				
3400 Other Funds Ltd	365,688	365,688	0	-
4375 Employee Recruitment and Develop				
3400 Other Funds Ltd	8,420	8,420	0	-
4400 Dues and Subscriptions				
3400 Other Funds Ltd	10,406	10,406	0	-
4425 Facilities Rental and Taxes				
3400 Other Funds Ltd	276,712	276,712	0	-
4475 Facilities Maintenance				

Description	Agency Request Budget (V-01) 2025-27 Base Budget	Governor's Budget (Y-01) 2025-27 Base Budget	Column 2 minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	4,911	4,911	0	-
4575 Agency Program Related S and S				
3400 Other Funds Ltd	1,661,133	1,661,133	0	-
4650 Other Services and Supplies				
3400 Other Funds Ltd	5,301	5,301	0	-
4700 Expendable Prop 250 - 5000				
3400 Other Funds Ltd	31,678	31,678	0	-
4715 IT Expendable Property				
3400 Other Funds Ltd	155,803	155,803	0	-
TOTAL SERVICES & SUPPLIES				
3400 Other Funds Ltd	3,995,860	3,995,860	0	-
CAPITAL OUTLAY				
5550 Data Processing Software				
3400 Other Funds Ltd	2,000,000	2,000,000	0	-
TOTAL EXPENDITURES				
3400 Other Funds Ltd	15,695,348	15,695,348	0	-
ENDING BALANCE				
3400 Other Funds Ltd	2,069,989	2,069,989	0	-
AUTHORIZED POSITIONS				
8150 Class/Unclass Positions	33	33	0	-
AUTHORIZED FTE				
8250 Class/Unclass FTE Positions	33.00	33.00	0	-

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 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	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3160 Temporary Appointments

3400 Other Funds Ltd 708 708 0 0.00%

3170 Overtime Payments

3400 Other Funds Ltd 131 131 0 0.00%

3190 All Other Differential

3400 Other Funds Ltd 73 73 0 0.00%

SALARIES & WAGES

3400 Other Funds Ltd 912 912 0 0.00%

TOTAL SALARIES & WAGES

\$912 \$912 \$0 0.00%

OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd 43 43 0 0.00%

3221 Pension Obligation Bond

3400 Other Funds Ltd (27,801) (27,801) 0 0.00%

3230 Social Security Taxes

3400 Other Funds Ltd 70 70 0 0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 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	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3240 Unemployment Assessments				
3400 Other Funds Ltd	18	18	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	6,508	6,508	0	0.00%
OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	(21,161)	(21,161)	0	0.00%
TOTAL OTHER PAYROLL EXPENSES	(\$21,161)	(\$21,161)	\$0	0.00%
P.S. BUDGET ADJUSTMENTS				
3455 Vacancy Savings				
3400 Other Funds Ltd	74,318	74,318	0	0.00%
P.S. BUDGET ADJUSTMENTS				
3400 Other Funds Ltd	74,318	74,318	0	0.00%
TOTAL P.S. BUDGET ADJUSTMENTS	\$74,318	\$74,318	\$0	0.00%
PERSONAL SERVICES				
3400 Other Funds Ltd	54,069	54,069	0	0.00%
TOTAL PERSONAL SERVICES	\$54,069	\$54,069	\$0	0.00%

EXPENDITURES

01/06/25

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ANA101A - Package Comparison Report - Detail

ANA101A

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Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 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	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	54,069	54,069	0	0.00%
TOTAL EXPENDITURES	\$54,069	\$54,069	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	(54,069)	(54,069)	0	0.00%
TOTAL ENDING BALANCE	(\$54,069)	(\$54,069)	\$0	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

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

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

EXPENDITURES

SERVICES & SUPPLIES

4100 Instate Travel

3400 Other Funds Ltd 4,048 4,048 0 0.00%

4125 Out of State Travel

3400 Other Funds Ltd 460 460 0 0.00%

4150 Employee Training

3400 Other Funds Ltd 1,689 1,689 0 0.00%

4175 Office Expenses

3400 Other Funds Ltd 2,478 2,478 0 0.00%

4200 Telecommunications

3400 Other Funds Ltd 2,950 2,950 0 0.00%

4225 State Gov. Service Charges

3400 Other Funds Ltd 338,518 338,518 0 0.00%

4250 Data Processing

3400 Other Funds Ltd 4,989 4,989 0 0.00%

4275 Publicity and Publications

3400 Other Funds Ltd 1,676 1,676 0 0.00%

4300 Professional Services

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

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

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3400 Other Funds Ltd	8,236	8,236	0	0.00%
4315 IT Professional Services				
3400 Other Funds Ltd	17,514	17,514	0	0.00%
4325 Attorney General				
3400 Other Funds Ltd	85,059	85,059	0	0.00%
4375 Employee Recruitment and Develop				
3400 Other Funds Ltd	354	354	0	0.00%
4400 Dues and Subscriptions				
3400 Other Funds Ltd	437	437	0	0.00%
4425 Facilities Rental and Taxes				
3400 Other Funds Ltd	11,622	11,622	0	0.00%
4475 Facilities Maintenance				
3400 Other Funds Ltd	206	206	0	0.00%
4575 Agency Program Related S and S				
3400 Other Funds Ltd	69,768	69,768	0	0.00%
4650 Other Services and Supplies				
3400 Other Funds Ltd	223	223	0	0.00%
4700 Expendable Prop 250 - 5000				
3400 Other Funds Ltd	1,330	1,330	0	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

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

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
4715 IT Expendable Property				
3400 Other Funds Ltd	6,544	6,544	0	0.00%
SERVICES & SUPPLIES				
3400 Other Funds Ltd	558,101	558,101	0	0.00%
TOTAL SERVICES & SUPPLIES	\$558,101	\$558,101	\$0	0.00%
CAPITAL OUTLAY				
5550 Data Processing Software				
3400 Other Funds Ltd	84,000	84,000	0	0.00%
EXPENDITURES				
3400 Other Funds Ltd	642,101	642,101	0	0.00%
TOTAL EXPENDITURES	\$642,101	\$642,101	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	(642,101)	(642,101)	0	0.00%
TOTAL ENDING BALANCE	(\$642,101)	(\$642,101)	\$0	0.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Revenue Shortfalls
 Pkg Group: POL Pkg Type: 070 Pkg Number: 070

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

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	(260,208)	(164,664)	95,544	36.72%
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SALARIES & WAGES

3400 Other Funds Ltd	(260,208)	(164,664)	95,544	36.72%
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TOTAL SALARIES & WAGES	(\$260,208)	(\$164,664)	\$95,544	36.72%
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OTHER PAYROLL EXPENSES

3210 Empl. Rel. Bd. Assessments

3400 Other Funds Ltd	(144)	(72)	72	50.00%
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3220 Public Employees Retire Cont

3400 Other Funds Ltd	(54,748)	(34,645)	20,103	36.72%
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3230 Social Security Taxes

3400 Other Funds Ltd	(19,906)	(12,597)	7,309	36.72%
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	(1,041)	(659)	382	36.70%
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3250 Workers Comp. Assess. (WCD)

3400 Other Funds Ltd	(84)	(42)	42	50.00%
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Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Revenue Shortfalls
 Pkg Group: POL Pkg Type: 070 Pkg Number: 070

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3270 Flexible Benefits				
3400 Other Funds Ltd	(84,816)	(42,408)	42,408	50.00%
OTHER PAYROLL EXPENSES				
3400 Other Funds Ltd	(160,739)	(90,423)	70,316	43.75%
TOTAL OTHER PAYROLL EXPENSES	(\$160,739)	(\$90,423)	\$70,316	43.75%
P.S. BUDGET ADJUSTMENTS				
3455 Vacancy Savings				
3400 Other Funds Ltd	(130,861)	(250,305)	(119,444)	(91.28%)
P.S. BUDGET ADJUSTMENTS				
3400 Other Funds Ltd	(130,861)	(250,305)	(119,444)	(91.28%)
TOTAL P.S. BUDGET ADJUSTMENTS	(\$130,861)	(\$250,305)	(\$119,444)	(91.28%)
PERSONAL SERVICES				
3400 Other Funds Ltd	(551,808)	(505,392)	46,416	8.41%
TOTAL PERSONAL SERVICES	(\$551,808)	(\$505,392)	\$46,416	8.41%
SERVICES & SUPPLIES				
4100 Instate Travel				
3400 Other Funds Ltd	(48,192)	(48,192)	0	0.00%
4275 Publicity and Publications				
3400 Other Funds Ltd	-	(24,280)	(24,280)	100.00%

Real Estate Agency

Agency Number: 91900

**Package Comparison Report - Detail
2025-27 Biennium
Real Estate Agency**

**Cross Reference Number: 91900-050-00-00-00000
Package: Revenue Shortfalls
Pkg Group: POL Pkg Type: 070 Pkg Number: 070**

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
4300 Professional Services				
3400 Other Funds Ltd	-	(24,120)	(24,120)	100.00%
4315 IT Professional Services				
3400 Other Funds Ltd	-	(70,880)	(70,880)	100.00%
4715 IT Expendable Property				
3400 Other Funds Ltd	-	(46,416)	(46,416)	100.00%
SERVICES & SUPPLIES				
3400 Other Funds Ltd	(48,192)	(213,888)	(165,696)	(343.82%)
TOTAL SERVICES & SUPPLIES	(\$48,192)	(\$213,888)	(\$165,696)	(343.82%)
EXPENDITURES				
3400 Other Funds Ltd	(600,000)	(719,280)	(119,280)	(19.88%)
TOTAL EXPENDITURES	(\$600,000)	(\$719,280)	(\$119,280)	(19.88%)
ENDING BALANCE				
3400 Other Funds Ltd	600,000	719,280	119,280	19.88%
TOTAL ENDING BALANCE	\$600,000	\$719,280	\$119,280	19.88%
AUTHORIZED POSITIONS				
8150 Class/Unclass Positions	(2)	(1)	1	50.00%
AUTHORIZED FTE				
8250 Class/Unclass FTE Positions	(2.00)	(1.00)	1.00	50.00%

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

EXPENDITURES

PERSONAL SERVICES

SALARIES & WAGES

3110 Class/Unclass Sal. and Per Diem

3400 Other Funds Ltd	-	162,912	162,912	100.00%
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SALARIES & WAGES

3400 Other Funds Ltd	-	162,912	162,912	100.00%
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TOTAL SALARIES & WAGES

	-	\$162,912	\$162,912	100.00%
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OTHER PAYROLL EXPENSES

3220 Public Employees Retire Cont

3400 Other Funds Ltd	-	34,277	34,277	100.00%
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3230 Social Security Taxes

3400 Other Funds Ltd	-	10,302	10,302	100.00%
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3241 Paid Family Medical Leave Insurance

3400 Other Funds Ltd	-	512	512	100.00%
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OTHER PAYROLL EXPENSES

3400 Other Funds Ltd	-	45,091	45,091	100.00%
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TOTAL OTHER PAYROLL EXPENSES

	-	\$45,091	\$45,091	100.00%
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P.S. BUDGET ADJUSTMENTS

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

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

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
3465 Reconciliation Adjustment				
3400 Other Funds Ltd	-	(27)	(27)	100.00%
P.S. BUDGET ADJUSTMENTS				
3400 Other Funds Ltd	-	(27)	(27)	100.00%
TOTAL P.S. BUDGET ADJUSTMENTS	-	(\$27)	(\$27)	100.00%
PERSONAL SERVICES				
3400 Other Funds Ltd	-	207,976	207,976	100.00%
TOTAL PERSONAL SERVICES	-	\$207,976	\$207,976	100.00%
EXPENDITURES				
3400 Other Funds Ltd	-	207,976	207,976	100.00%
TOTAL EXPENDITURES	-	\$207,976	\$207,976	100.00%
ENDING BALANCE				
3400 Other Funds Ltd	-	(207,976)	(207,976)	100.00%
TOTAL ENDING BALANCE	-	(\$207,976)	(\$207,976)	100.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 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	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
EXPENDITURES				
SERVICES & SUPPLIES				
4325 Attorney General				
3400 Other Funds Ltd	-	(33,671)	(33,671)	100.00%
SERVICES & SUPPLIES				
3400 Other Funds Ltd	-	(33,671)	(33,671)	100.00%
TOTAL SERVICES & SUPPLIES	-	(\$33,671)	(\$33,671)	100.00%
EXPENDITURES				
3400 Other Funds Ltd	-	(33,671)	(33,671)	100.00%
TOTAL EXPENDITURES	-	(\$33,671)	(\$33,671)	100.00%
ENDING BALANCE				
3400 Other Funds Ltd	-	33,671	33,671	100.00%
TOTAL ENDING BALANCE	-	\$33,671	\$33,671	100.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 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	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
EXPENDITURES				
SERVICES & SUPPLIES				
4225 State Gov. Service Charges				
3400 Other Funds Ltd	-	(112,290)	(112,290)	100.00%
SERVICES & SUPPLIES				
3400 Other Funds Ltd	-	(112,290)	(112,290)	100.00%
TOTAL SERVICES & SUPPLIES	-	(\$112,290)	(\$112,290)	100.00%
EXPENDITURES				
3400 Other Funds Ltd	-	(112,290)	(112,290)	100.00%
TOTAL EXPENDITURES	-	(\$112,290)	(\$112,290)	100.00%
ENDING BALANCE				
3400 Other Funds Ltd	-	112,290	112,290	100.00%
TOTAL ENDING BALANCE	-	\$112,290	\$112,290	100.00%

Real Estate Agency

Agency Number: 91900

Package Comparison Report - Detail
 2025-27 Biennium
 Real Estate Agency

Cross Reference Number: 91900-050-00-00-00000
 Package: Wholesaler Registration - Fee Establishment
 Pkg Group: POL Pkg Type: POL Pkg Number: 100

Description	Agency Request Budget (V-01)	Governor's Budget (Y-01)	Column 2 Minus Column 1	% Change from Column 1 to Column 2
	Column 1	Column 2		
REVENUE CATEGORIES				
LICENSES AND FEES				
0205 Business Lic and Fees				
3400 Other Funds Ltd	15,000	15,000	0	0.00%
AVAILABLE REVENUES				
3400 Other Funds Ltd	15,000	15,000	0	0.00%
TOTAL AVAILABLE REVENUES	\$15,000	\$15,000	\$0	0.00%
ENDING BALANCE				
3400 Other Funds Ltd	15,000	15,000	0	0.00%
TOTAL ENDING BALANCE	\$15,000	\$15,000	\$0	0.00%

PIC100 - Position Budget Report

Real Estate Agency

2025-27 Biennium

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

Budget Preparation

Governors 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											-	-	6,233,280	-	6,233,280				
Total OPE											-	-	3,165,070	-	3,165,070				
Total Personal Services													32	32.00	-	-	9,398,350	-	9,398,350

PIC100 - Position Budget Report

Real Estate Agency

2025-27 Biennium

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

Budget Preparation

Governors 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
0000569	AR C0107 AP	ADMINISTRATIVE SPECIALIST 1	17	PF	1	1.00	24	5	4297	SAL	-	-	103,128	-	103,128
										OPE	-	-	72,522	-	72,522
0005002	MEAH Z7586 HF	AGENCY HEAD 6	39X	PF	1	1.00	24	10	17336	SAL	-	-	416,064	-	416,064
										OPE	-	-	158,350	-	158,350
0005003	MESN Z7082 AF	BUSINESS OPERATIONS ADMINISTRATC	38X	PF	1	1.00	24	10	15502	SAL	-	-	372,048	-	372,048
										OPE	-	-	148,451	-	148,451
0005012	AR C0860 AP	PROGRAM ANALYST 1	23	PF	1	1.00	24	10	7200	SAL	-	-	172,800	-	172,800
										OPE	-	-	92,789	-	92,789
0005017	MMS X7085 AP	BUSINESS OPERATIONS MANAGER 1	31X	PF	1	1.00	24	10	11028	SAL	-	-	264,672	-	264,672
										OPE	-	-	119,515	-	119,515
0005021	MMS X7436 AP	LICENSING AND PERMITTING SUPERVIS	28X	PF	1	1.00	24	3	6791	SAL	-	-	162,984	-	162,984
										OPE	-	-	89,934	-	89,934
0005024	AR C5248 AP	COMPLIANCE SPECIALIST 3	29	PF	1	1.00	24	10	9587	SAL	-	-	230,088	-	230,088
										OPE	-	-	109,455	-	109,455
0005025	AR C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	6545	SAL	-	-	157,080	-	157,080
										OPE	-	-	88,217	-	88,217
0005026	AR C1482 IP	INFORMATION SYSTEMS SPECIALIST 2	21	PF	1	1.00	24	10	6556	SAL	-	-	157,344	-	157,344
										OPE	-	-	88,293	-	88,293
0005030	AR C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	6545	SAL	-	-	157,080	-	157,080
										OPE	-	-	88,217	-	88,217
0005032	MMS X7144 AP	COMPLIANCE AND REGULATORY MANA	33X	PF	1	1.00	24	10	12165	SAL	-	-	291,960	-	291,960
										OPE	-	-	127,453	-	127,453
0005033	AR C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	6545	SAL	-	-	157,080	-	157,080
										OPE	-	-	88,217	-	88,217
0005039	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	8309	SAL	-	-	199,416	-	199,416
										OPE	-	-	100,532	-	100,532
0005043	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	8309	SAL	-	-	199,416	-	199,416
										OPE	-	-	100,532	-	100,532
0005046	MMN X0863 AP	PROGRAM ANALYST 4	31	PF	1	1.00	24	9	11028	SAL	-	-	264,672	-	264,672
										OPE	-	-	119,515	-	119,515
0005050	B Y7500 AE	BOARD AND COMMISSION MEMBER	0	PP	0	0.00	0	0	0	SAL	-	-	720	-	720

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PIC100 - Position Budget Report

Real Estate Agency

2025-27 Biennium

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

Budget Preparation

Governors 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	-	-	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	7200	SAL	-	-	172,800	-	172,800
										OPE	-	-	92,789	-	92,789
0005061	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	3	5960	SAL	-	-	143,040	-	143,040
										OPE	-	-	84,133	-	84,133
0005067	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	8309	SAL	-	-	199,416	-	199,416
										OPE	-	-	100,532	-	100,532
0005069	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	10	6243	SAL	-	-	149,832	-	149,832
										OPE	-	-	86,108	-	86,108
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	5	5170	SAL	-	-	124,080	-	124,080
										OPE	-	-	78,616	-	78,616
0005115	AR C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	10	6545	SAL	-	-	157,080	-	157,080
										OPE	-	-	88,217	-	88,217
0005120	AR C5246 AP	COMPLIANCE SPECIALIST 1	21	PF	1	1.00	24	9	6243	SAL	-	-	149,832	-	149,832
										OPE	-	-	86,108	-	86,108

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PIC100 - Position Budget Report

Real Estate Agency

**2025-27 Biennium
Budget Preparation**

**Cross Reference Number: 91900-050-01-00-00000
Governors 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
0005125	MMC X1322 AP	HUMAN RESOURCE ANALYST 3	29	PF	1	1.00	24	3	7490	SAL	-	-	179,760	-	179,760
										OPE	-	-	94,815	-	94,815
0005130	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	3	5960	SAL	-	-	143,040	-	143,040
										OPE	-	-	84,133	-	84,133
0005904	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	10	6243	SAL	-	-	149,832	-	149,832
										OPE	-	-	86,108	-	86,108
0005920	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	10	6243	SAL	-	-	149,832	-	149,832
										OPE	-	-	86,108	-	86,108
0005928	AR C0108 AP	ADMINISTRATIVE SPECIALIST 2	20	PF	1	1.00	24	10	6243	SAL	-	-	149,832	-	149,832
										OPE	-	-	86,108	-	86,108
0005933	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	10	8309	SAL	-	-	199,416	-	199,416
										OPE	-	-	100,532	-	100,532
0005934	AR C5235 AP	FINANCIAL INVESTIGATOR 1	26	PF	1	1.00	24	6	6861	SAL	-	-	164,664	-	164,664
										OPE	-	-	90,423	-	90,423
0005937	AR C1486 IP	INFORMATION SYSTEMS SPECIALIST 6	29	PF	1	1.00	24	10	9742	SAL	-	-	233,808	-	233,808
										OPE	-	-	110,536	-	110,536
0005938	AR C5247 AP	COMPLIANCE SPECIALIST 2	25	PF	1	1.00	24	10	7918	SAL	-	-	190,032	-	190,032
										OPE	-	-	97,802	-	97,802
0005950	MMS X7145 AP	COMPLIANCE AND REGULATORY MANA 31X		PF	1	1.00	24	10	11028	SAL	-	-	264,672	-	264,672
										OPE	-	-	119,515	-	119,515
Total Salary											-	-	6,233,280	-	6,233,280
Total OPE											-	-	3,165,070	-	3,165,070
Total Personal Services					32	32.00	-	-	9,398,350	-	9,398,350				