



MULTNOMAH COUNTY OREGON

BOARD OF COUNTY COMMISSIONERS
ROOM 605, COUNTY COURTHOUSE
1021 S.W. FOURTH AVENUE
PORTLAND, OREGON 97204

GLADYS McCOY • Chair • 248-3308
PAULINE ANDERSON • District 1 • 248-5220
GRETCHEN KAFOURY • District 2 • 248-5219
RICK BAUMAN • District 3 • 248-5217
SHARRON KELLEY • District 4 • 248-5213
JANE McGARVIN • Clerk • 248-3277

AGENDA OF
MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS
FOR THE WEEK OF
July 17 to 21, 1989

Tuesday, July 18, 1989 - 1:30 PM - Informal Meeting . . Page 2
Thursday, July 20, 1989 - 9:30 AM - Formal. Page 3

Tuesday, July 18, 1989 - 1:30 PM

Multnomah County Courthouse, Room 602

INFORMAL

1. Informal Review of Bids and Requests for Proposals:
 - a) Microfiche Reader/Printers
 - b) Janitorial Services for County Courthouse
(8 floors and basement)
 - c) A & T System Software Package
 - d) Development Offering - Blue Lake Park
2. Discussion of Recommendation on a locational adjustment petition to Metro to add land to the Urban Growth Boundary near Gresham - Lorna Stickel
3. Informal Review of Formal Agenda of July 20, 1989

PUBLIC TESTIMONY WILL NOT BE TAKEN AT INFORMAL MEETINGS

Thursday, July 20, 1989, 9:30 AM

Multnomah County Courthouse, Room 602

Formal Agenda

1. SPECIAL EVENT: Celebrate the Multnomah County Fair

CONSENT CALENDAR

DEPARTMENT OF ENVIRONMENTAL SERVICES

- C-1 Order accepting deed from Norman B. Burger, Billie L. Burger, Robert C. McDonnell and Francee I. McDonnell on N.W. Skyline Circle (South of Skyline Blvd.) Item No. 89-149 for public road purposes
- C-2 Order accepting deed from Leroy E. Cothrell on S.E. Division Drive, County Road No. 644 (East of Troutdale Road) Item No. 89-168 for county road purposes
- C-3 Order accepting deed from Nicolae Moldovan and Anna Moldovan on S.E. Holgate Blvd. County Road No. 992 (East of S.E. 122nd Avenue) Item No. 89-159 for county road purposes
- C-4 Order accepting perpetual easement for slopes from Guy R. and Chris Wolcott at Oxbow Parkway (North of Francis Street) Item No. 89-165
- C-5 Order accepting deed from LeRoy Carson and Helen Rae Williams at S.E. 223rd Avenue County Road No. 1967 (N of S.E. Stark Stret) Item No. 87-303

REGULAR AGENDA

PLANNING ISSUES

- R-6 Case RB 1-89: Resolution in the Matter of Issuance of an Industrial Development Revenue Bond State of Oregon to Imperial Manufacturing Company for property located at NE 194th Avenue and NE San Rafael Street (Continued from July 11, 1989)

ORDINANCES - DEPARTMENT OF ENVIRONMENTAL SERVICES

- R-7 Second Reading - An Ordinance amending Multnomah County Code Chapter 9.10 (Building Permit Fees)
- R-8 Second Reading - An Ordinance amending Multnomah County Code Chapter 9.20 (Electrical Permit Fees)
- R-9 Second Reading - An Ordinance amending Multnomah County Code Chapter 9.30 (Plumbing Permit Fees)

DEPARTMENT OF HUMAN SERVICES

- R-10 In the matter of ratification of an intergovernmental agreement with the Tri-County Metropolitan District of Oregon (Tri-Met) to provide estimated 106,385 one-way door-to-door rides for transportation-disadvantaged elderly who cannot use regular bus services in Multnomah County

Thursday Meetings of the Multnomah County Board of Commissioners are recorded and can be seen at the following times:

Thursday, 10:00 PM, Channel 11 for East and West side subscribers

Friday, 6:00 P.M., Channel 27 for Rogers Multnomah East subscribers

Saturday 12:00 PM, Channel 21 for East Portland and East County subscribers

0500C.13-16



MULTNOMAH COUNTY OREGON

1
7-18-89

DEPARTMENT OF GENERAL SERVICES
PURCHASING SECTION
2505 S.E. 11TH AVENUE
PORTLAND, OREGON 97202
(503) 248-5111

CLERK OF
BOARD OF
COUNTY COMMISSIONERS
GLADYS MCCOY
COUNTY CHAIR
JUL 12 11 10 AM '89
MULTNOMAH COUNTY
OREGON

MEMORANDUM

TO: Jane McGarvin, Clerk of the Board
FROM: Lillie M. Walker, Director, Purchasing Section
DATE: JULY 12, 1989
SUBJECT: FORMAL BIDS AND REQUESTS FOR PROPOSALS SCHEDULED FOR INFORMAL BOARD

The following Formal Bids and/or Professional Services Request for Proposals (RFPs) are being presented for Board review at the Informal Board on Tuesday, July 18, 1989.

Bid/RFP No.	Description/Buyer	Initiating Department
B39-310-3588	MICROFICHE READER/PRINTERS	DGS/A & T
	Buyer: Roger Bruno Ex. 5111	Contact: Juanita Lomax Phone: 3375
B76-800-4005	JANITORIAL SERVICES FOR COUNTY COURTHOUSE-8 floors & basement	DES/FM
	Buyer: Larry Weaver Ex. 5111	Contact: Estella Ehelebe Phone: 3322
RFQ# 900505	A & T SYSTEM SOFTWARE PKG	DGS/ISD
	Buyer: Roger Bruno Ex. 5111	Contact: Marge Hough Phone: 3749

cc: Gladys McCoy, County Chair
Board of County Commissioners
Linda Alexander, Director, DGS

Copies of the bids and RFPs are available from the Clerk of the Board.



MULTNOMAH COUNTY OREGON

DEPARTMENT OF GENERAL SERVICES

PURCHASING DIVISION
2505 S.E. 11TH AVENUE
PORTLAND, OREGON 97202
(503) 248-5111

GLADYS McCOY
COUNTY CHAIR

Formal Bids and Professional Services Requests for Proposals (RFPs) for Informal Board,
Tuesday, July 18, 1989.

Continued . . .

Bid/RFP No.	Description/Buyer	Initiating Department
RFP# 9P0643	DEVELOPMENT OFFERING-BLUE LK. PK. Buyer: Franna Ritz Ex. 5111	DES/PARKS Contact: Nancy Chase Phone: 5050
	Buyer: Ex. 5111	Contact: Phone:

TO: DAILY JOURNAL OF COMMERCE

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: August 10, 1989 at 2:00 P.M.

Proposal No. B76-800-4005

Sealed proposals will be received by the Director of Purchasing, 2505 S.E. 11th Ave., Portland, OR 97202 for:

Janitorial Services for eight floors and the basement of the
Multnomah County Courthouse

as per specifications on file with the Purchasing Director. No proposal will be received or considered unless the proposal contains a statement by the bidder as part of his bid that the requirements of ORS 279.350 shall be included. Multnomah County reserves the right to reject any or all proposals.

MANDATORY PRE-BIDS WILL BE HELD ON: July 27, 1989, 8:00 AM for
floors 5 thru 8, and July 28, 1989 at 8:00 AM for floors 4 thru
basement, at the Courthouse, 1021 SW 4th, Portland, OR. ATTENDANCE
IS REQUIRED ON BOTH DAYS.

Specifications may be obtained at: Multnomah County Purchasing Section
2505 S.E. 11th Avenue
Portland, OR 97202
(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: July 20, 1989

AD2

TO: THE OBSERVER

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

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2505 S.E. 11th Avenue

Portland, OR 97202

(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: WEEK OF JULY 24, 1989
AD2

TO: THE SKANNER

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: August 10, 1989 at 2:00 P.M.

Proposal No. B76-800-4005

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IS REQUIRED ON BOTH DAYS.

Specifications may be obtained at: Multnomah County Purchasing Section

2505 S.E. 11th Avenue

Portland, OR 97202

(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: WEEK OF JULY 24, 1989
AD2

M U L T N O M A H C O U N T Y , O R E G O N

INVITATION FOR BIDS #B76-800-4005 To be opened 2:00 p.m. August 10, 1989

SEALED PROPOSALS will be received by the Purchasing Director of Multnomah County in the Ford Building Lobby, 2505 S.E. 11th Avenue, Portland, Oregon, 97202, until 2:00 p.m. Portland time and will be publicly opened and read for furnishing JANITORIAL SERVICES FOR EIGHT FLOORS AND THE BASEMENT OF THE COUNTY COURTHOUSE as per specifications as indicated herein. To ensure proper bid identification and handling, USE THE BID ENVELOPE, attached herewith.

Specifications are on file with the Purchasing Section and may be seen there, and copies thereof may be obtained at the Office of the Purchasing Director, 2505 S.E. 11th Avenue, Portland, Oregon, 97202. Protests to the specifications will not be considered unless detailed in official correspondence to the Purchasing Director and received five (5) days or more prior to the opening date.

As required by ORS 279.021, Multnomah County shall always, price, fitness, and quality being equal, prefer supplies, goods, wares, merchandise, manufacturers or produce that has been grown, manufactured, or produced in this State and shall next prefer such as have been partially manufactured, grown, or produced in this State.

Also, the constitutional debt limitation for counties requires any County contract which extends beyond the current fiscal year to be executed subject to future appropriations to fund its provisions, and contract documents will reflect this condition.

Pursuant to Multnomah County Administrative Rules, the County may, in its discretion, waive the bid security requirements of ORS 279.033 for contracts other than those for public improvements. No proposal will be considered unless accompanied by a check payable to Multnomah County, certified by a responsible bank, or in lieu thereof a surety bond for an amount equal to ten percent of the aggregate proposal, unless otherwise specified in the space provided below. The successful bidder shall furnish a bond satisfactory to the Board in the full amount of the contract.

Surety Bond: W A I V E D

The right is expressly reserved to reject any and all bids.

Dated at Portland, Oregon July 20, 1989

Publication Date: July 20, 1989

Board of County Commissioners
Multnomah County, Oregon

By Lillie M. Walker, Director
Purchasing Section

To the Board of County Commissioners:

The undersigned proposes to furnish the services herein mentioned at the unit price indicated, all in accordance with the specifications and provisions as herein above set forth, attached hereto and made a part hereof.

In compliance with ORS 279.350 Subsection 4 where applicable, and as a part of this bid, the bidder herein agrees to covenant in his contract and it shall be a condition of his bond that in performing his contract he will pay and cause to be paid not less than the prevailing rate of wages as of the date every worker who may be employed in and about the performance of his contract. If the public officers who make the contract determine at any time that the prevailing rate of wages has not been or is not being paid as required by the contract, they may retain from the monies due to the contractor an amount sufficient to make up the difference between the wages actually paid and the prevailing rate of wages, and they may also cancel the contract.

The undersigned bidder hereby represents as follows: That this bid is made without connection with any person, firm or corporation making a bid for the same material, and is in all aspects fair and without collusion or fraud.

Delivery to be F.O.B. _____ within _____ after receipt of order.

(Signature of Bidder) _____
Legal name of firm or corporation

By _____
(Name)

Dated _____

(Title)

Address _____

INSTRUCTIONS TO BIDDERS

INSPECTION OF FACILITIES

A pre-bid inspection tour of the facility is scheduled for Thursday, July 27, 1989 for floors 5 through 8, and Friday, July 28, 1989 for the basement through floor 4. Bidders shall meet at 8:00 A.M. in the Courthouse main floor lobby each day. **FAILURE TO ATTEND THE PRE-BID INSPECTION BOTH DAYS AND SIGN THE WALK-THROUGH ATTENDANCE REPORT BOTH DAYS SHALL BE CAUSE FOR REJECTION OF BID.** To minimize the disruption of County workers, only one representative per company will be permitted to attend the walk-through.

Each bidder shall, from this inspection and the accompanying specifications, determine to his own satisfaction the nature and extent of the services required. There is no expressed or implied agreement or warranty that the nature and extent of services are completely accurate as indicated herein. The bidder must take into consideration the possibility that the nature and extent of services required may vary from that indicated herein.

The submitting of a bid shall constitute confirmation that the bidder has determined to his own satisfaction, considering the above information, the nature and extent of services required under this contract.

Any questions relating to attendance of the pre-bid inspection should be directed to:

Larry Weaver
Purchasing Section
Telephone: 248-5111

COMPLETION OF FORMS

The bidder must submit his bid on the Bidding Sheet, Page 18 hereof. The blank spaces should be completed in accordance with the apparent intent. **THE SIGNATURE OF THE BIDDER SUPPORTING THE BID MUST APPEAR IN THE SPACE PROVIDED FOR THIS PURPOSE ON PAGE 2.**

Bids which do not conform to these requirements may be rejected as informal.

TIME AND PLACE OF RECEIVING BIDS

The time and place at which bids are to be received are as stated on Page 1 hereof.

ORGANIZATION

Bidder shall state in his bid whether he is doing business as an individual, a partnership or a corporation and, if incorporated, in what State; if a partnership, shall give the names of all partners. The person signing on behalf of the corporation or partnership shall state his position with the firm or corporation, and shall state whether the corporation is licensed with the Oregon State Corporation Commissioner to do business in the State of Oregon.

BID PRICES TO COVER ENTIRE WORK

Bidders must include in their bids the entire cost of the work set forth in these specifications and in the bid, and it is understood and agreed that there is included in the total bid the entire cost of materials to be supplied by Contractor and labor to the County for completion of the work specified for the full contract period.

EXPERIENCE

Each bidder shall submit with this bid a written record of his custodial experience. This record will be a factor in determining the responsiveness of the bid. Failure to submit the record will be cause for rejection of the bid.

ADDENDA TO SPECIFICATIONS

If it should appear to a bidder that the specifications are not definite and clear, the bidder is requested to make inquiry regarding same to Larry Weaver, Buyer, telephone 248-5111. If in his opinion, additional information or interpretation is necessary, such information will be supplied in the form of an addendum which will be delivered to all individuals, firms, and corporations having taken out specifications and such addendum shall have the same binding effect as though contained in the main body of the specifications. Oral instructions or information concerning the specifications or the projects given out by County officers, employees or agents to prospective bidders shall not bind the County. Any addenda shall be issued by the Purchasing Agent not less than five (5) days prior to bid opening.

METHOD OF AWARD

Award will be made to the bidder submitting the lowest responsive bid. The award will be made on an all-or-none basis, as in the best interest of the County. The right is expressly reserved to reject any or all bids.

MINIMUM REQUIREMENTS

To be considered responsive, each bidder MUST completely respond to the following minimum requirements. Any bid which does not fully and completely comply with this requirement WILL be rejected as non-responsive.

Each bidder MUST provide excellent references from three (3) companies for the cleaning of buildings, one of which will be for a building of 200,000 square feet or larger.

Bidders MUST provide documentation of their ability to meet the following requirements.

- a. On site supervisor/lead person.
- b. Field supervision.
- c. Minimum of twenty (20) full time employees capable of passing a security check by Multnomah County Sheriff's Department.
- d. 24 hour emergency response capability.
- e. Inspection capability.
- f. Uniforms with company ID or logo.

Bidders must submit proof of insurance of not less than \$1,000,000, and ability to be bonded for not less than \$10,000.

Bidder MUST submit the number of hours required and the cost to the County to perform routine and periodic cleaning per the task schedule.

GENERAL SPECIFICATIONS

SCOPE

This solicitation is for ongoing routine daily custodial services as indicated herein for eight floors and the basement of the Multnomah County Courthouse.

The successful bidder shall furnish all equipment, materials and services necessary to satisfactorily perform the janitorial duties specified, in the manner and at the frequencies set forth in the enclosed specifications. Premises shall be maintained according to the tasks identified in the task schedule, at the frequencies identified, and shall be cleaned in a manner consistent with acceptable industry standards. The task schedule will be the only acceptable guideline for work to be performed.

SUPERVISION

The successful bidder shall be responsible for the direct on site supervision of the custodians through its designated representative, and such representative shall be available at reasonable times to report to and confer with agents of Multnomah County with respect to services. The telephone number of the responsible supervisor shall be provided to the County for daily and emergency and/or nonroutine service.

The successful bidder shall equip staff doing day-porter/lead worker service work with a radio pager unit equal to Motorola Page Boy unit.

INSPECTION

A representative of the successful bidder shall make an inspection of all work done at regular intervals, not less than once weekly. Such inspection shall be made by a representative of the successful bidder who is thoroughly familiar with all the services specified. Further, inspection of the work will be made by the Director of Facilities and Property Management, or his designated representative. Any variation from the terms hereof shall be reported to the successful bidder. A representative of the County and a representative of the successful bidder shall make periodic inspections together and any variations from the terms or the specifications shall be corrected. Failure to correct the continued variation within a seven (7) day period shall be cause for contract termination.

INDEMNIFICATION

The successful bidder agrees to defend, hold and save the County and all its officers, agents and employees harmless from and against any and all claims for loss, injury or damage to persons or property arising out of the activities conducted by the successful bidder.

INSURANCE

Successful bidder shall maintain such public liability and property damage insurance as will protect the successful bidder and the County from any and all claims for damage to property or personal injury, including death, which may arise from operations under the contract or in connection therewith, including all operations of any subcontractors. Such insurance shall provide coverage for not less than \$1,000,000 for personal injury to each person, \$500,000 for each occurrence, and \$500,000 for each occurrence involving property damage, OR a single limit policy of not less than \$1,000,000 covering all claims per occurrence. Such insurance shall be without prejudice to coverage otherwise existing, and shall name as additional insureds, Multnomah County and all other governmental bodies with jurisdiction in the area involved under the contract, their officers and employees, and shall further provide that the policy not terminate or be cancelled prior to the completion of the contract without sixty (60) days notice in writing first being given to the Purchasing Director. Notwithstanding the naming of additional insureds, the said policy shall protect each insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured. Such insurance shall be subject to the approval of the County Counsel on behalf of the County as to the adequacy of protection. Such limits shall be subject to the statutory changes as to maximum limits of liability imposed on municipalities of the State of Oregon during the term of the contract incorporating these specifications.

CONTRACTOR'S PERFORMANCE BOND

At the time of execution of this agreement, the successful bidder must furnish a performance bond or bonds approved by the Purchasing Director in an amount of \$10,000, and conditioned upon compliance with and fulfillment of all the terms and provisions of the contract including maintenance, repair and replacement and all applicable laws, and payment as due to all persons supplying labor and/or materials for the prosecution of the contract terms. Successful bidder shall be responsible for all loss or damage to the premises or to the property of the County arising out of successful bidder's operations under the contract.

TERM OF CONTRACT

The time period for this contract shall be from date of contract through June 30, 1990. Upon agreement by both parties, contract may be renewed for two (2) additional one (1) year periods. This agreement may be terminated at any time with cause by the County, or by either party upon giving not less than 30 days written notice of termination to the other party.

In the event the successful bidder fails to comply with any of the terms and conditions of the contract, the County reserves the right to demand remedy of any failure or any fault within seven (7) days, and if the successful bidder fails to remedy the fault or failure within seven (7) days, the County shall have the right to cancel and terminate the contract without additional notification.

NOTICES

Notices by successful bidder to the County regarding this agreement shall be made in writing to the Purchasing Director, Ford Building, 2505 S.E. 11th Avenue, Portland, Oregon, 97202, with a copy to F. Wayne George, Director, Facilities & Property Management, Ford Building, 2505 S.E. 11th Avenue, Portland, Oregon, 97202.

Notices by the County to successful bidder shall be made in writing to the successful bidder at his/her mailing address as shown in the Purchasing Director's records, with a copy to the Facilities Director.

EMPLOYMENT STANDARDS

The successful bidder agrees that upon request by Multnomah County, it will remove from the County's premises any successful bidder's employee, who, in the reasonable opinion of Multnomah County, is guilty of improper conduct, or is not qualified to perform the work assigned. The successful bidder shall understand that its employees shall be subject to a security check.

ASSIGNMENT

The successful bidder shall not have the right or power to assign or transfer his responsibility under the contract, without written permission of the County.

NONDISCRIMINATION IN EMPLOYMENT

The successful bidder's attention is directed to the provisions of Oregon Revised Statutes, Chapter 659, prohibiting discrimination in employment.

SECURITY

Any disclosure or removal of any matter and/or property on the part of the successful bidder shall be cause for immediate cancellation of the contract. Any liability including but not limited to attorneys fees, resulting from any action or suit brought against the County or the State of Oregon as a result of the successful bidder's willful or negligent release of information, documents, or property contained in the building shall be borne by the successful bidder.

All personnel working in the building shall have security clearance. There will be no exceptions and no substitutions of personnel without a prior clearance check.

IDENTIFICATION OF EMPLOYEES

Successful bidder will provide uniforms and identification for its employees; all employees must wear uniforms at all times while in the building, so that each is readily identifiable as such. All successful bidder's personnel will be clean and neat at all times. All Courthouse employees shall be screened by the Sheriff's Department, and when cleared, shall be issued photo identification which must be worn on duty.

MULTNOMAH COUNTY, OREGON

INVITATION FOR BIDS, continued
Bid No. B76-800-4005

Page 10

MULTNOMAH COUNTY, OREGON

The party by whom this proposal is submitted, and by whom the contract will be entered into in case the award is made to him, is _____

("a corporation," "a partnership" or "an individual")

doing business at _____ Street,

_____, City and State, which address is the address to which all communications concerned with this proposal and the contract should be sent.

The names of the president, treasurer and manager of the bidding corporation, or the names and residences of all persons and parties interested in this proposal as partners or principals are as follows:

NAME	ADDRESS
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

The name of the surety by which the surety bond covering the contract, if awarded, will be furnished, and the name and address of the surety's local agent are as follows:

Name of Surety _____

Name of Agent _____

Address _____

SPECIFIC SPECIFICATIONS**STAFFING AND MANHOURS**

Bidders shall specify the number of manhours of work to be provided per month for cleaning. The information shall be specified in the space provided on the bidding sheet. The hours specified shall include those hours required (if any) to bring the facility to a level of cleanliness that will permit on-going maintenance as specified.

The County reserves the right to reject any bid which in the judgment of the County provides for an unrealistically low or high number of manhours or work, considering the scope of the work required.

EXCEPTION CLEANING SERVICE

The successful bidder may occasionally be required to perform cleaning services on an exception basis for items or areas not covered by the Schedule Package. Such services will be requested by the Contract Administrator on an individual basis, and shall be billed separately on a monthly basis as applicable. The successful bidder shall specify a dollar cost per manhour for exception cleaning services and holiday cleaning services in the space provided on the bidding sheet. Holiday cleaning service applies only to the holidays recognized by Multnomah County.

MATERIALS AND SUPPLIES

All materials and supplies required to perform the services specified, which do not appear on the list of materials supplied by the County, shall be supplied by the successful bidder.

The County may, during the term of the contract, specify various items to be supplied by the successful bidder, upon mutual agreement with the successful bidder.

LIST OF MATERIALS SUPPLIED BY THE COUNTY

Paper Towels
Roll Towels
Toilet Paper
Seat Protectors
Hand Soap: Liquid
Powder
Bar
Napkins, Sanitary
Wax, Liquid, Floor, Polymer Type
Sealer, Floor
Disinfectant Cleaner, Germicidal Type
Foaming Cleanser
Liner, Garbage Can, and Liner, Wastebasket
Rubber Gloves

INCREASE OR DECREASE IN SERVICE

During the term of this contract, the County shall have the option to increase or decrease the amount of space to be serviced or the amount of service to be performed under this contract. The contract rate for such increase or decrease shall be adjusted upon mutual agreement of the parties.

In the event that the parties cannot agree upon a rate for said increase or decrease in service, the contract may be terminated by either party upon 30 days written notice.

GENERAL NOTATIONS

1. Successful bidder's employees shall not operate or adjust the settings of any of the heating, ventilating, or air conditioning systems in this facility without written approval of Facilities and Property Management.
2. Successful bidder's employees shall gather and store segregated wastepaper for recycling, in areas designated for this purpose.
3. Successful bidder's employees shall leave only designated lights on, and shall check windows and doors for security upon completion of custodial work.
4. Successful bidder shall learn and carefully operate building security systems, according to instructions.
5. Successful bidder's employees shall report any damaged or broken plumbing, glass, light fixtures, furniture, and lavatory fixtures to the Facilities Management representative.
6. Successful bidder's employees shall order needed supplies through the Facilities and Property Management Secretary, 248-3322, allowing three (3) weeks lead time so supplies don't run out.
7. Successful bidder's employees shall report any unusual security problems to the Facilities Management representative.
8. Successful bidder shall use designated closets and areas for storage of equipment and supplies.
9. In all Courthouse areas, each room shall be cleaned and securely locked before moving to the next room for cleaning. At no time shall doors be left unlocked. Doors may not be propped open. If a room must be left before it is completely cleaned, the door must be locked until cleaning can be resumed.

BUILDING CLEANING/TASK SCHEDULE

Days for Cleaning: Monday through Friday.

I. Offices, lounges, general work spaces, meeting rooms, stairways, entrances, elevators.

Empty, clean, and reline waste receptacles - daily.

Dust ledges, sills, and flat surfaces below 70" - daily.

Dust and clean desks, chairs, tables, file counters, telephone, desk appointments, and other furniture (Do NOT disturb papers on desks) - daily.

Gather wastepaper and place for disposal - daily.

Clean all entrance doors and hallway doors glass - daily.

Spot clean door frames, walls, furniture so as to be free of hand soil, kick marks, spills, and graffiti - daily.

Clean and sanitize drinking fountains - daily.

Refill dispensers - daily.

Properly arrange furniture - daily.

Clean doors, frames, light switches, walls, door hardware, handles and railings, thresholds, kick plates, furniture, counters, built-ins, partitions, baseboards, elevator cab control panels, wall panels and elevator grilles as required and no less than weekly.

Clean and polish metal work, paneling, woodwork, built-ins, and furniture - monthly.

High dust and/or vacuum drapes, vents, ducts, grilles, piping, diffusers, panelled walls, and other vertical surfaces, ceilings, and baseboards - monthly.

Vacuum all upholstered furniture - monthly.

II. Rest rooms, rest room lounges. WEAR RUBBER GLOVES WHEN CLEANING ALL RESTROOMS.

Clean and disinfect all sinks, toilets, urinals, showers, bathtubs, flushrings, drains overflow outlets, faucets, and toilet seats - daily.

Clean, disinfect, and polish all metal work, glass, and mirrors - daily.

Refill dispensers - daily.

Disinfect and mop all floors - daily.

Dust and clean all furniture and fixtures - daily.

Spot clean walls, doors and partitions - daily.

Do high dusting of piping lights, vents, grilles, ducts, ceilings, and walls - weekly.

Clean and disinfect all doors, door frames, partitions, walls, fixtures, door hardware, ledges, counters, baseboards as required and no less than weekly.

III. Dining rooms, kitchens, preparation spaces, eating areas.

Clean and disinfect tables, chairs, and drinking fountains.

Dust all furnishings, sills, and ledges.

Clean, disinfect, and reline all waste receptacles - daily.

Clean entrances, other door glass and mirrors - daily.

Spot wash all walls, counters, doors, door frames, door hardware, metal work so as to remove handsoil, spills, and spots - daily.

Disinfect mop all resilient/tile floors - weekly.

Vacuum traffic areas, work areas and other component parts of these kinds of spaces as required and no less than daily.

Clean and disinfect all doors, partitions, walls, fixtures, door frames, ledges, counters, baseboards and furniture and furnishings - weekly.

High dusting of all walls, ducts, ceilings, louvers, grilles, furnishing, paneling, piping, other vertical and horizontal surfaces - weekly.

-
- IV. Resilient and hard surface floors such as quarry tile and terrazzo (Note: Floors in all parts of facilities are to be cleaned as set forth below unless specified otherwise in other cleaning schedule sections).

Dust mop - daily.

Sweep - daily.

Spot mop traffic areas so as to remove soil, spots and other visible soil build ups - as required and not less than daily.

Clean entrance mats - daily.

Clean entrance mats and thresholds - weekly.

Spray buff traffic areas - weekly.

Mop all areas fully and recoat with one coat sealer on hard surface floors and with one coat floor conditioner on resilient floors - as required, and no less than monthly.

- V. Carpeted floors (Note: Floors in all parts of facilities are to be cleaned as set forth below for carpeted areas unless specified otherwise in other cleaning schedule sections).

Thoroughly vacuum all main traffic and work areas - daily.

Clean entrance mats - daily.

Spot clean and remove carpet spills and stains - daily.

Vacuum completely and close edge vacuum all carpeted areas including corners - under furniture - weekly.

Clean recesses for mats and thresholds - weekly.

Full extraction cleaning of all carpeted areas will be provided no less than once every six months. (Note: High traffic areas where soil build up is excessive and visible must be spot cleaned as required.)

- VI. Window Glass - Exterior

Wash interior and exterior sides of all windows, door glass, as required in all one story buildings.

VII. Warehouse, storerooms, exterior sidewalks.

Sweep and/or dust mop warehouse and store room type spaces - weekly.

Spot mop spills and build up - daily.

Sweep exterior walkways, and sidewalks - as required and no less than weekly.

Damp mop warehouse storerooms - weekly.

Remove snow and apply deicer on the exterior sidewalks and walkways - daily.

VIII. Porter Service - where provided

Clean all entrances, door hardware, thresholds and entrance mats, and entrance glass - daily.

Remove snow, apply deicer as required - daily.

Clean up tracked in water, snow, rain, debris - as required - daily.

Spot clean handsoil, spills, graffiti, debris from walls, doors, door frames, glass, carpets, hard or resilient floors in lobbies, stairs, halls, elevators, elevator lobbies, restrooms, food areas and other people intensive, or high traffic areas as required - daily.

Sweep, dust mop, damp mop, vacuum all high traffic areas as required - daily.

Check and refill dispensers and empty waste receptacles as required due to usage - daily.

Unlock and open building entrances and other designated spaces in the building, turn on designated lights, place trash bins out for pick up and replace after pickup as designated. Also, do other related work as designated so as to begin facility operating business day - daily.

Porter service staffing requires one person to work a daily shift as designated each day of scheduled building operations.

INVITATION FOR BIDS, continued
Bid No. B76-800-4005

Page 17

IX. Security

Secure facilities at beginning and completion of cleaning work as designated - daily.

BIDDING SHEET

Manhours proposed _____ per month

Dollar Rate \$ _____ per month

Total Bid \$ _____ 12 month

Exception Cleaning Services \$ _____ per hour

Holiday Cleaning Services \$ _____ per hour

TO: DAILY JOURNAL OF COMMERCE

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: July 28, 1989 at 2:00 P.M.

Proposal No. B39-310-3588

Sealed proposals will be received by the Director of Purchasing, 2505 S.E. 11th Ave., Portland, OR 97202 for:

MICROFICHE READER/PRINTERS

as per specifications on file with the Purchasing Director. No proposal will be received or considered unless the proposal contains a statement by the bidder as part of his bid that the requirements of ORS 279.350 shall be included. Multnomah County reserves the right to reject any or all proposals.

Specifications may be obtained at: Multnomah County Purchasing Section

2505 S.E. 11th Avenue

Portland, OR 97202

(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: July 20, 1989

AD2:PURCH2



MULTNOMAH COUNTY OREGON

INVITATION FOR BIDS # B39-310-3588 To be opened 2 P.M. July 27, 1989

SEALED BIDS will be received by the Purchasing Director of Multnomah County in the Ford Building Lobby, 2505 S.E. 11th Avenue, Portland, Oregon, 97202, until 2 P.M. Pacific Time and will be publicly opened and read for furnishing
MICROFICHE READER/PRINTERS

in estimated quantities and as per specifications as indicated herein. To insure proper bid identification and handling, USE THE BID ENVELOPE, attached herewith.

Protests to the specifications will not be considered unless detailed in official correspondence to the Purchasing Director and received five (5) days or more prior to the opening date.

As required by ORS 279.021, Multnomah County shall always--price, fitness and quality being equal--prefer supplies, goods, wares, merchandise, manufacturers or produce that has been grown, manufactured or produced in this State and shall next prefer such as have been partially manufactured, grown or produced in this State.

Also the constitutional debt limitation for counties requires any county contract which extends beyond the current fiscal year to be executed subject to future appropriations to fund its provisions, and contract documents will reflect this condition.

Pursuant to Multnomah County Administrative Rules, the County may, in its discretion, waive the bid security requirements of ORS 279.033 for contracts other than those for public improvements. No proposal will be considered unless accompanied by a check payable to Multnomah County, certified by a responsible bank, or in lieu thereof a surety bond for an amount equal to ten percent of the aggregate proposal, unless otherwise specified in the space provided below. The successful bidder may be required to furnish a performance bond satisfactory to the Board in the full amount of the contract.

Surety Bond: W A I V E D

The right is expressly reserved to reject any and all bids.

Dated at Portland, Oregon July 10, 1989.

Board of County Commissioners
MULTNOMAH COUNTY, OREGON

Publication Dates July 20, 1989

By _____
Lillie M. Walker, Director
Purchasing Section

INSTRUCTIONS TO BIDDERS

IMPORTANT NOTICE RE: VENDOR SELECTION LIST

If your firm does not wish to bid at this time, but wishes to remain on the vendor selection list for other Microfiche Reader Printers, please send a written "NO BID" to the above address or call Roger Bruno at 503-248-5111 and submit a verbal "NO BID" no later than November 1, 1988.

All vendors not responding (written or oral) to this invitation to bid may be automatically dropped from the future vendor selection list for this item category but will remain on all other lists applied for.

EQUIVALENT PRODUCTS

Product brands or models, if stated or implied by the specifications, indicate type, design, and quality desired, and shall not restrict bidding to one manufacturer. Products which meet or exceed specification requirements for design, quality, and functional utility will be considered. Ref. ORS 279.017.

If bid is for an equivalent item, include descriptive information brochure and/or specifications sufficient for the County to make a determination as to equivalency.

Any variations from specifications on equivalent products must be itemized. Failure to do so may cause rejection of the bid or rejection of the unit or product after delivery if unitemized variations are found upon inspection of the unit.

METHOD OF AWARD

Award will be made to the bidder submitting the lowest responsive bid. The award will be made on an all-or-none basis, or by individual item as in the best interest of the County. The right is expressly reserved to reject any or all bids.

INVITATION FOR BIDS, continued
Bid No. B39-310- 3588

Page 4

CLARIFICATION OF SPECIFICATIONS

Any vendor requiring further clarification of the information contained herein should submit specific questions in writing to:

Roger A. Bruno, Buyer
2505 S.E. 11th Avenue
Portland, OR 97202

A written response will be provided to those questions which are deemed appropriate, copies of which will be sent to all vendors in receipt of this IFB. Questions will not be answered verbally except those which would clarify specifications and requirements of this IFB and as further provided herein. However, any actions or changes resulting from these communications will be forwarded to all bidders as an addendum to this IFB.

Oral instructions or information concerning the specifications for the projects or requirements given out by County officers, employees, or agents to prospective bidders shall not bind the County. Any addenda shall be issued by the Purchasing Director not later than five (5) days prior to bid opening.

CANCELLATION

Multnomah County reserves the right to cancel award of this contract at any time before execution of the contract by both parties if cancellation is deemed to be in Multnomah County's best interest. In no event shall Multnomah County have any liability for the cancellation of award. The bidder assumes the sole risk and responsibility for all expenses connected with the preparation of this proposal.

TERMS

TERMS OF PAYMENT

Discounts for early payment will be considered in awarding the bid if at least 20 days are allowed for making payment. Discount time shall commence upon receipt of material/services or properly executed invoice, whichever is the later.

Please indicate terms in space provided above on page 1. If terms are not indicated on the bid, the invoice(s) will be paid on a net 30 days basis.

MULTNOMAH COUNTY, OREGON

INVITATION FOR BIDS, continued
Bid No. B39-310-3588

Page 5

FOB

All prices are to be quoted F.O.B. destination to:

Multnomah County
Assessment and Taxation
610 S.W. Alder St., Rm. 200
Portland, Oregon

MULTNOMAH COUNTY, OREGON

INVITATION FOR BIDS
Bid No. B39-310-3588

SPECIFICATIONS FOR MICROFICHE READER PRINTER:

- 1) Dimensions-
28" deep x 16" wide x 25" high
- 2) Screen-
12" wide x 12" high; blue, non-glare
- 3) Weight- 110 lbs.
- 4) Projection- Rear
- 5) Carrier- Standard-4" x 6" automatic opening
- 6) Optics- Standard 42X
- 7) Indexing- Interchangeable grids
- 8) Construction- Metal frame and base, high impact sides
- 9) Color- Ivory and textured black
- 10) Electrical- 120 volt, 60 Hz., A.C.
- 11) Illumination- 250 watts, 24 volt, EVC type
- 12) Paper- 8 1/2 x 11- Plain Paper (bond) Sheet Cassette, minimum Automatic
- 13) Unit must produce dry copies and require no liquid chemical
- 14) Print Speed- 9 prints/minute
- 15) Warm-up Time- 40 seconds
- 16) Print System: Unimode Positive
Unimode Negative
- 17) Multiple Copies- 1-99 copies. LED indicator
- 18) Safety Listing- U.L., CSA, FCC
- 19) Controls- Front mounted

MULTNOMAH COUNTY, OREGON

INVITATION FOR BIDS
Bid No. B39-310-3588

SPECIFICATIONS FOR MICROFILM READER PRINTERS

- 1) Unit must be for 16mm microfilm.
- 2) Unit must be self-threading.
- 3) Size of screen must be no less than 12" x 12".
- 4) Unit must have odometer.
- 5) Unit must produce dry copies and require no liquid chemical.
- 6) Unit must produce prints in less than 12 seconds.
- 7) Unit must be capable of producing positive copies from both positive and negative file, via a Bi-mode switch.
- 8) Unit must have a 24X lens.
- 9) Unit must accept either ANSI spools and/or Ekamete cartridge.
- 10) Unit must use plain bond paper, size 8 1/2" x 11".
- 11) Unit must be U.L. Approved.
- 12) Unit must fit on a 32" deep counter.
- 13) Unit must have a turntable.
- 14) Unit must have image rotation.
- 15) Unit must have function controls mounted on the front.
- 16) Unit must produce a minimum of 10 copies per minute.
- 17) Unit must have masking capability.
- 18) Electrical- 110 volt, 60 Hz., A.C.

TO: DAILY JOURNAL OF COMMERCE
Please run the following Classified Advertisement as indicated below, under your
"CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: RFP# 9P0643 at 2:00 P.M.

Proposal No. September 7, 1989

Sealed proposals will be received by the Director of Purchasing, 2505 S.E. 11th Ave., Portland, OR 97202 for:

Proposals to finance, develop, and manage a RV Park and
Golf Course at Blue Lake Park

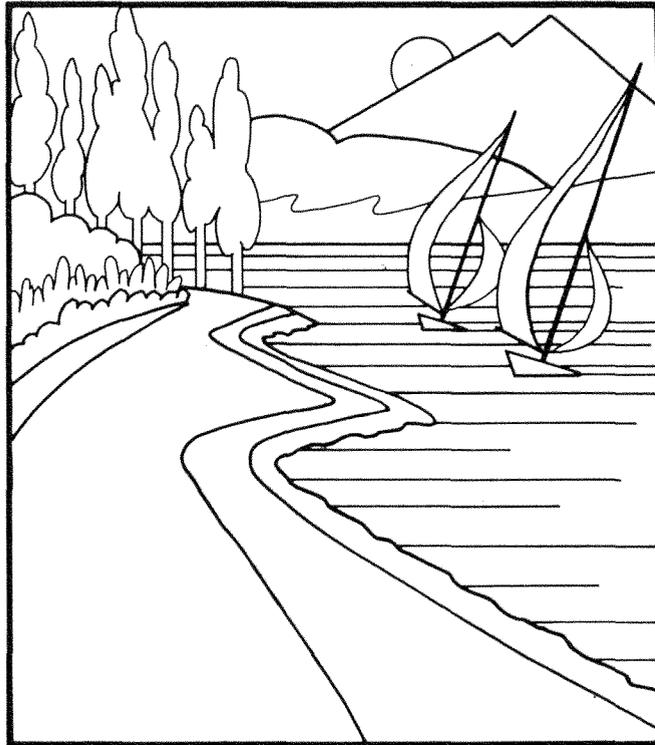
Multnomah County reserves the right to reject any or all proposals.

Specifications may be obtained at: Multnomah County Purchasing Section
2505 S.E. 11th Avenue
Portland, OR 97202
(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: July 20, 21 & 24, 1989

BLUE LAKE PARK
A Service of Multnomah County



DEVELOPMENT OFFERING

RFP#9P0643

BLUE LAKE PARK
DEVELOPMENT OFFERING

CONFERENCE

To assist potential developer(s) in preparing material for submittal in response to the Request for Proposals (RFP), Multnomah County will hold an optional **Development Offering Conference** on **Thursday, August 10, 1989**, at **2:00 p.m.**. This conference will be held at the County Maintenance and Operations facility, Upstairs Conference Room, located at 1620 SE 190th Avenue, Portland, Oregon.

For further information regarding the Development Offering and the Conference contact:

Ms. Franna Ritz
Multnomah County
Purchasing Section
2505 SE 11th Avenue
Portland, OR 97202
(503) 248-5111

BLUE LAKE PARK
DEVELOPMENT OFFERING

INTRODUCTION

The following information is intended to provide potential developers with an overview of the Blue Lake Park Golf Course and Recreational Vehicle Development Offering. The offering provides background information on the project, project timeline, developer selection process, and developer selection criteria. In addition, an Appendix Section has been assembled to give specific development information and criteria which will govern the project.

It is the intention of Multnomah County to enter into an agreement with a private individual and/or group for developing a golf course, driving range, and support facilities on an approximately 43 acre site and an RV Park on approximately 27 acre site adjacent to Blue Lake Park. The terms of the development agreement are not specified in this offering, and are open to negotiation. The County has conducted a preliminary economic market feasibility study, but makes no implied or expressed warranties as to the market demand for this project.

All potential developer(s) are encouraged to carefully read through the entire Development Offering and submit only those materials requested herein. All interested parties must submit the information outlined in the Request for Proposals (RFP). This information will be reviewed by the County Selection Committee (CSC) and a developer(s) selected.

Upon selection of the developer(s) the County will negotiate the details of the development in Multnomah County's best interest.

**Deadline for interested parties to respond to the Request for Proposals is:
Thursday, Sept. 7, 1989, 2:00 P.M., Prevailing Pacific Time.**

Responses must be delivered to:

Lillie Walker, Director
Multnomah County
Purchasing Section
2505 SE 11th Avenue
Portland, OR 97202

BLUE LAKE PARK
DEVELOPMENT OFFERING

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F R O M

Sharron Kelley

Councilor, District 7

Goals & objectives of the R.F.P.
selection criteria is noble



METROPOLITAN SERVICE DISTRICT

Providing Zoo, Transportation, Solid Waste and
other Regional Services

METRO

527 S.W. Hall St., Portland, OR 97201 • 503/221-1646

BLUE LAKE PARK
DEVELOPMENT OFFERING

SUMMARY

The County intends to enter into a development agreement with a private developer(s) who would plan, finance, construct and operate a golf course and/or RV Park within the area specified. (See Plate 1.) Developer(s) will be selected to negotiate a development agreement with Multnomah County through a two-phase selection process. The County Selection Committee (CSC) will review the Request for Proposals (RFP) from all interested parties.

The CSC will select a developer(s) based on the RFP criteria outlined on Pages 6-7. The County will then negotiate the contract and development design details. Should no resolution be reached between the CSC and the developer; the CSC reserves the right to proceed to the next ranked developer. Any agreement reached is subject to the review and approval of the Director of Environmental Services and the County Chair.

The County is offering the following development scenarios:

1. A one hundred and seventy-six (176) space RV Park and an executive nine hole golf course and driving range per the approved Master Plan (see Plate 3).

OR

2. A one hundred and seventy-six (176) space RV Park and a regular nine hole golf course and driving range. (This design would encompass the Fujii property see Plate 5.)

OR

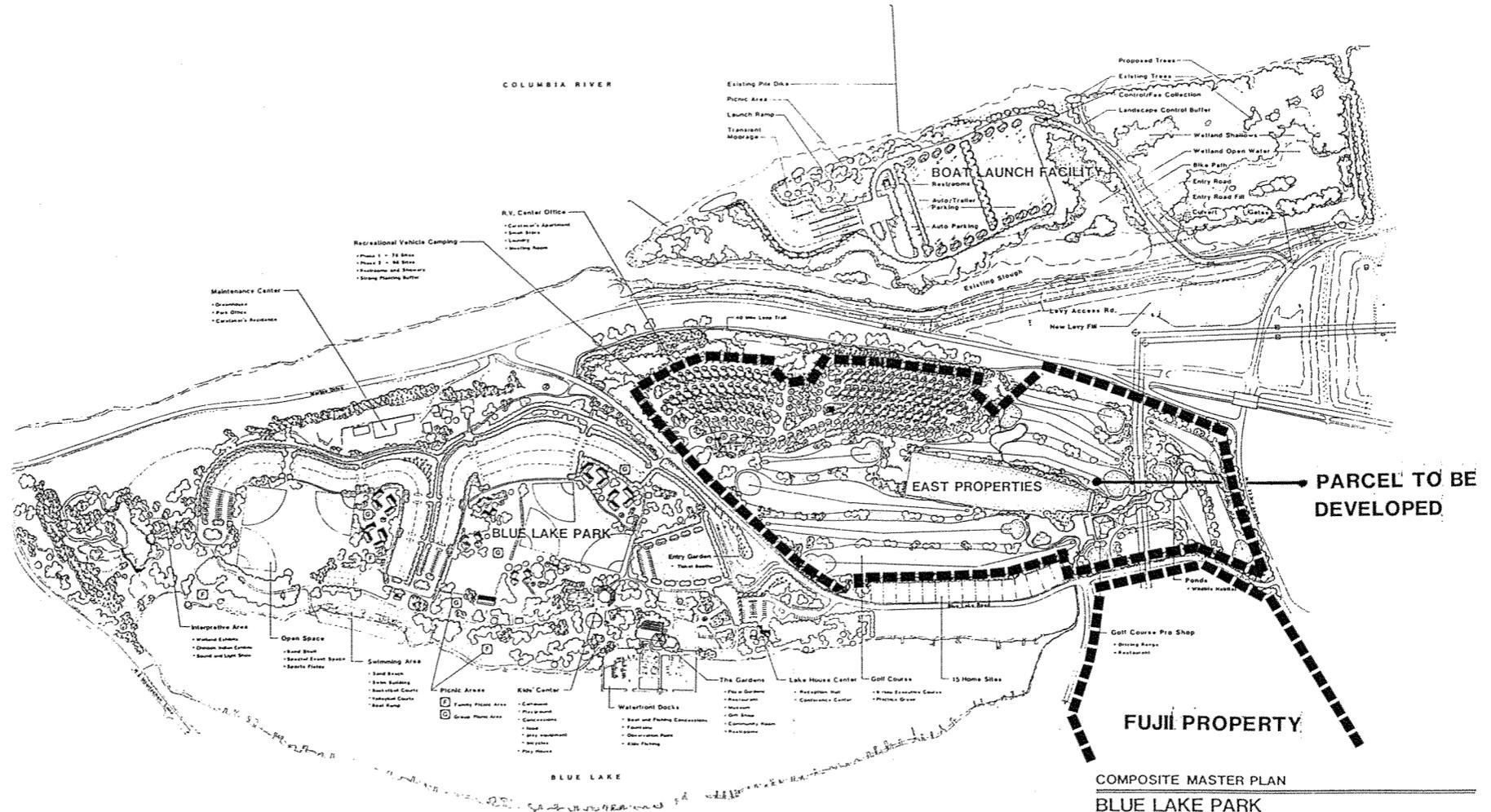
3. A one hundred and seventy-six (176) space RV Park and an eighteen (18) hole golf course and driving range. (This design would encompass the Fujii property. The short course is depicted on Plate 6 the regulation 18 course is depicted on Plate 7.

Multnomah County has identified the following development objectives for the improvements to the Blue Lake Properties:

- ° The County's primary objective is to provide golf, RV camping and accompanying support facilities to serve the recreational needs of the citizens of Multnomah County and visitors to the area.
- ° Secondly, the County seeks to increase revenues generated from Blue Lake properties to offset the cost of Blue Lake Park operations and maintenance.
- ° Third, the County hopes to see an increase in total business activity through the development of these uses.

- ° Fourth, the County seeks to encourage the development of the surrounding area in coordination with the proposed improvements to Blue Lake Park.
- ° Fifth, the County seeks to increase attendance at Blue Lake Park through awareness of new recreational opportunities.
- ° Sixth, the County wishes to provide public access to Fairview Lake.
- ° Seventh, it is the County's first choice to work with one developer for both the golf course and RV project in the belief that this will allow for the best development in the most cost effective manner.

Compensation to the County by the developer is open to negotiation. The County has explored various forms of compensation including but not limited to: annual land lease fee, percentage of gross revenues, and a combination of both annual lease fee and percentage of gross revenues. Potential developer(s) must propose how the project is to be financed, and propose terms for the development agreement. In evaluating proposals from potential developer(s) the County will closely examine how the developer will maximize revenue to the County while also producing a reasonable rate of return on investment for the developer.



COMPOSITE MASTER PLAN
 BLUE LAKE PARK
 EAST PROPERTIES
 BOAT LAUNCH FACILITY
 MULTNOMAH COUNTY PARKS DEPARTMENT



PREPARED BY J. D. WALSH & ASSOCIATES, INC. 11/30/87

BLUE LAKE PARK DEVELOPMENT OFFERING

PROJECT BACKGROUND

In 1960 Multnomah County acquired the Blue Lake Properties, 185 acres of land located between the Columbia River and Interstate 84. Since this time, the County has operated Blue Lake Park, a regional recreation facility serving the Portland-Vancouver Metropolitan area. This 60 acre park has been developed for picnics, swimming, and family-oriented recreation. The remaining 125 acres have remained vacant.

In October of 1984, the Board of County Commissioners adopted a resolution to develop a long-term development plan for the Blue Lake Properties. The resolution provided for the creation of a citizen task force and the hiring of a land planning consultant to assist the County Parks staff in preparing the plan. Upon the recommendation of the Blue Lake Park Task Force and after review by the general public, the Board of County Commissioners adopted the Blue Lake Park Development Plan in November of 1985.

As part of the adopted Development Plan, the Framework Plan designated a variety of land uses for the Blue Lake Park Properties and set the guidelines for the Master Plan Development (Refer to Appendix A - Framework Plan, Page 19). The Framework Plan dictates that the existing 60 acre park is to remain a regional family-oriented recreation facility. The remaining 125 acres will be utilized in the following manner: 1) 22 acres for expanding current park facilities, 2) 27 acres for developing a Recreational Vehicle Park, 3) 43 acres for developing a golf course, driving range, and accompanying facilities, 4) 3 acres for developing Single Family Home Lots, and 5) 30 acres held in reserve for future development.

Within the context of the Framework Plan, the County proceeded to prepare a Master Plan for the Blue Lake Properties. The resulting Blue Lake Park Master Plan set the foundation for future expansion and development of the existing park facility. The proposed park improvements are documented in the Blue Lake Park Master Plan (See Appendix B - Blue Lake Park Master Plan, Page 22).

The County is currently developing plans for improvements to the existing Blue Lake Park facilities as proposed in the Blue Lake Park Master Plan. To date the following improvements have been made:

- ° Building and site improvements to the Lake House facility and the Food Concession Building
- ° Construction of a Kid's Center play area
- ° Construction of group picnic shelters
- ° Construction of a park entry road and parking areas
- ° Construction of the Wetland Interpretive Center
- ° Construction of a new Swim Beach
- ° Acquisition of 69 acres to the north for a six lane boat ramp with a scheduled opening of fall 1991

MASTER PLAN

Multnomah County has prepared several preliminary Master Plans for the golf course facilities and RV Park (See Appendix C - East Properties Master Plan, Page 25).

One of these plans (Plate 4) has received design and land use approval from the City of Fairview. It illustrates a 2,300 yard course utilizing water elements as special features, hazards, and wildlife habitat areas, designed to allow for the water flow from Blue Lake. The plan provides for developing a nine-hole golf course, driving range, practice green, pro-shop, and parking for 100 vehicles. Several other scenario's have been developed (Plates 5 to 7). It has been assumed that the chosen developer will retain a qualified golf course architect to develop a detailed plan. The plan also provides for developing a recreational vehicle park with 176 camping sites, restrooms and showers, RV Center Office, small convenience store, caretaker's residence, trails and playground area. It emphasizes generous landscaped buffers surrounding the perimeter and separating each individual space to give the development a park-like quality.

Within the identified development area, the City of Portland has constructed a water well pump station to supply potable drinking water to the City of Portland. Physical access has been provided to this facility in the Preliminary Master Plan. Portland General Electric has a high transmission power line located within the golf course site. The Master Plan was designed to provide physical access to this line, as required by Portland General Electric.

While the County has received zoning and preliminary design approval from the City of Fairview, it is the responsibility of the chosen developer to resubmit any proposed changes to the Master Plan to the City of Fairview for approval.

PERMIT APPROVAL PROCESS

The City of Fairview will be the governing public agency which approves all development plans and construction documents, and which issues building permits. The selected developer will be responsible for preparing all required construction documents and presenting all required construction documents to the City of Fairview for approval. The selected developer will also be responsible for obtaining any permit required by state or federal agencies and for all permit fees associated with the development.

In preparing construction documents the selected developer must also adhere to guidelines established by Multnomah County (See Appendix D - Golf Course and RV Facility Development Guidelines, Page 30). The County will not reimburse the developer for costs associated with the preparation of these construction documents.

PROJECT FINANCING

As part of the Blue Lake Park Development Plan, the County retained Touche Ross to conduct a preliminary financial analysis of the proposed development scenarios. A copy of this study is available at the Parks Services Office.

It is the intent of the County that the selected developer will be responsible for all site utility development costs from the point of connection to the lines provided along Blue Lake Road.

DEVELOPER SELECTION PROCESS

Each proposal will be screened by the County Finance Department for financial qualifications. Only those proposals presenting financial credentials appropriate for the proposed projects will be forwarded to the Selection Committee for further consideration.

The Selection Committee will review each of the proposals and assign points as described later in this RFP. The proposals receiving the highest number of points may be required to make an oral presentation to elaborate or clarify their written proposals. One or more of the developers will then proceed to the negotiation phase of this process, based on the committee's recommendation, to finalize the terms of the development agreement.

A. Financial Qualification

Only those developers demonstrating the financial capacity to carry out the proposed development will be considered by the CSC. As indicated, the County Finance Department will review the financial capacity of each proposer to pursue the proposed development. Financial references will be checked as well as the Certified Financial Statement. On the basis of this review, the Director of Finance will determine if the developer has sufficient financial resources for further consideration.

B. Proposal requirements are on Pages 16 to 18.

The CSC will use the following criteria as guidelines in selecting the developer(s) to enter into negotiations with Multnomah County.

I. Developer's Project Concept (20 points)

- A. Is the developer's project clear, concise and comprehensive? Does it meet the County's Development Objectives? (See Pages 1 & 2.)
- B. Do the detailed roles of the developer's consultants and development management team form a compatible, highly integrated approach to designing, financing, and building the project?

II. Developer's Project Design (20 points)

- A. Do the graphic materials and narrative submitted completely describe the physical components of the project?
- B. Are the recommended changes (if any) to the preliminary Master Plan compatible with the development criteria established in this document?
- C. Are the recommended changes (if any) based on documented assumptions?
- D. Does the potential developer offer a construction timeframe that is realistic?

III. Developer's Project Funding (20 points)

- A. Has the developer presented a comprehensive explanation of how the project capital improvements will be financed?
- B. Has the developer presented evidence of ability to obtain project financing?

IV. Developer's Financial Information (20 points)

- A. Are the pro-forma statements complete and based on sound economic assumptions?
- B. Are the pro-forma statements consistent with accepted financial practices?
- C. Do the pro-forma statements support the conceptual project design?
- D. Do the pro-forma statements support the business offer?
- E. Are the financial projections consistent with the financial capabilities of the developer and/or development group.

V. Developer's Business Offer (20 points)

- A. Does the County realize substantial economic benefits?
- B. Are the proposed terms of the development agreement acceptable or negotiable?
- C. Does the financial information submitted support the feasibility of the business offer?

The selection process established for selecting a developer is intended to minimize the front-end cost in terms of time and money for both the prospective developer and Multnomah County.

In addition to reviewing written material the CSC may conduct an interview with those developer(s) scoring highest on the written presentation. The purpose of the interview is to allow the CSC to clarify any questions they may have regarding the submission.

PROJECT SCHEDULE

An optional pre-bid meeting will be held Thursday, August 10, 1989, at 2:00 p.m. in the second floor conference room at the Yeon Shops located at 1620 SE 190th Avenue, Portland, Oregon. Request for Proposals must be received by 2:00 p.m. Thursday, September 7, 1989 at 2505 SE 11th Ave., Portland, OR.

Selection of the developer will be announced on or about Thursday, September 21, 1989. Negotiations between the County and the selected developer(s) will begin on or about October 1, 1989.

ADMONITION

The developer selection process will be managed by Ms. Franna Ritz. This person will be the primary contact and source of information for prospective developer(s). Any unauthorized contact concerning the Blue Lake Golf Course development with other County employees, members of the Board of County Commissioners and their staffs, or members of the County Selection Committee is not permitted and will be grounds for disqualification.

CLARIFICATION

Any vendor requiring clarification of the information or protesting any provision herein, must submit specific comments in writing to:

Franna Ritz
Purchasing Program Coordinator
Purchasing Section
2505 SE 11th Avenue
Portland, OR 97202

The deadline for submitting such questions or comments is Wednesday, August 30, 1989. If, in her opinion, additional information or interpretation is necessary, such information will be supplied in the form of an Addendum which will be delivered to all individuals, firms and corporations having taken out specifications and such Addendum shall have the same binding effect as though contained in the main body of the specifications. Oral instructions or information concerning the specifications or the project given out by County managers, employees, or agents to prospective bidders shall not bind Multnomah County. All Addenda shall be issued by the Purchasing Director not later than five (5) days prior to proposal deadline.

CANCELLATION

Multnomah County reserves the right to cancel award of this contract at any time before execution of the contract by both parties if cancellation is deemed to be in Multnomah County's best interest. In no event shall Multnomah County have any liability for the cancellation of award. The bidder assumes the sole risk and responsibility for all expenses connected with the preparation of its proposal.

PROPRIETARY INFORMATION

Confidential financial information will be held as proprietary if clearly marked and will not become part of the public record.

STATE LAW COMPLIANCE

The successful proposer agrees to make payment promptly as due to all persons supplying such successful proposer with labor or materials for the prosecution of the work provided for in this contract, and that said successful proposer will not permit any lien or claim to be filed or prosecuted against the County on account of any labor or material furnished, and agrees further that no person shall be employed for more than eight hours in any one day, or forty hours in any one week; unless in case of necessity or emergency, or where the public policy absolutely requires it, and in such case to pay wages in accordance with the provisions of ORS 279.334 and ORS 279.338, where applicable.

The successful proposer agrees that should the successful proposer fail, neglect or refuse to make prompt payment of any claim for labor or services furnished by any person for the prosecution of the work provided in this contract as said claim becomes due, whether said services and labor be performed for said successful proposer or a subcontractor, fail, neglect, or refuse to make all contributions or amounts due the State Industrial Accident Fund or to the State Unemployment Compensation Fund, and all sums withheld from employees due the State Department of Revenue, then and in such event the said County and the other proper officers representing said County may pay such claim or funds to the person furnishing such labor or services or to the State Industrial Accident Commission or to the State Unemployment Compensation or to the State Department of Revenue and charge the amount thereof against funds due or to become due said successful proposer by reason of his said contract, but payment of any such claims in the manner herein authorized shall not relieve the successful proposer or his surety from his or its obligation with respect to any unpaid claims.

The successful proposer shall promptly, as due, make payment to any person, copartnership, association or corporation furnishing medical, surgical or hospital care or other needed care and attention incident to sickness or injury to the employees of such successful proposer of all sums which the said successful proposer agrees to pay for such services, and all moneys and sums which the successful proposer may or shall have deducted from the wages of his employees for such services.

ASSIGNMENT

Neither the resultant contract nor any of the requirements, rights or privileges demanded by it may be sold, assigned, contracted, or transferred by the Contractor without the express written consent of Multnomah County.

NONDISCRIMINATION IN EMPLOYMENT

The successful proposer's attention is directed to the provisions of Oregon Revised Statutes, Chapter 659, prohibiting discrimination in employment.

CAVEATS

1. Multnomah County reserves the right to reject any or all responses to this Request for Proposal.
2. Multnomah County reserves the right to stop the selection at any time before execution of the development agreement.
3. Multnomah County reserves the right to waive any minor irregularities in the selection process.
4. Multnomah County will under no condition reimburse any individual or firm for those costs incurred as part of the selection process specified in this document.
5. Multnomah County makes no commitment, either expressed or implied, concerning future development or operation of Blue Lake Park. The continued development or operation of a park is a fiscal decision made by the Board of County Commissioners during the annual budget process. Changes in County revenue or County funding priorities may result in substantial changes to the development or use of Blue Lake Park and other County recreational facilities.

BLUE LAKE PARK
DEVELOPMENT OFFERING

DEVELOPER'S STATEMENT OF FINANCIAL QUALIFICATIONS

To facilitate the review by the County Selection Committee (CSC) potential developer(s) must submit the Statement of Financial Qualification in accord with the following format. Identify each response by the number listed by the question. It is not necessary to retype the entire question with each response.

1. Identification of Developer and/or Development Group

- 1.1 Give name, address, telephone number and Company name (if appropriate) of the Developer and indicate the principal contact person for this project.
- 1.2 Identify the legal status of the developer and/or development group. Indicate whether the legal entity is a corporation, partnership, joint venture, individual, etc., with which Multnomah County would contract. Give the date the organization was founded, provide federal and state business identification numbers or Social Security number (if developer is an individual), and indicate in which State(s) the entity can legally conduct business.
- 1.3 Identify the corporate officers, principal stockholders, general and limited partners, or other appropriate individuals depending on the developer's legal status. Give each individual's name, address, title of position, and provide a brief description of the interest each will hold in this project.
- 1.4 Identify and give a full description of any relationship, present or anticipated, that the developer and/or development group may have with a parent corporation, subsidiaries, joint ventures or any other legal business entities. If the developer and/or development group is a subsidiary, indicate if the parent corporation will guarantee performance on this project.

2. Complete the following forms which include:

Certification Statement
Statement of Financial Capability
Financial References
Certified Financial Statement

CERTIFICATION STATEMENT

This statement must be signed and attached to the Developer's Confidential Statement of Financial Capability. If the developer is a corporation, this statement must be signed by the Corporation President and Secretary. If the developer is a partnership the general or primary partner(s) must sign the statement. If the developer is a joint venture, the principals having direct knowledge of the financial information contained herein, must sign the statement. If the developer is a legal entity not having a president or secretary, the statement must be signed by the person responsible for the financial information or having direct knowledge of the financial information contained in the Statement of Financial Capability.

I (We) _____,
certify that this Confidential "Statement of Financial Capability" and the
attached evidence of the Offerer's financial responsibility, including
financial statements, are true and correct to the best of my (our) knowledge
and belief.

Name _____

Name _____

Title _____

Title _____

Address _____

Address _____

City _____

City _____

State _____ Zip Code _____

State _____ Zip Code _____

Signature _____

Signature _____

Date _____

Date _____

DEVELOPER'S CONFIDENTIAL
STATEMENT OF FINANCIAL CAPABILITY

Information provided in this statement must be current, accurate and must clearly represent the ability of the potential developer to provide financing for the proposed Project. Errors or omissions in the information requested will be grounds for disqualification from further consideration by the County. All information provided and contained herein will remain strictly confidential between the developer and Multnomah County.

Please provide the requested information on the forms provided in this Developer's Packet.

GENERAL INFORMATION

Name of Developer _____
Address _____
City _____ State _____ Zip Code _____

BACKGROUND INFORMATION

Has the Offerer or the Parent Corporation, any subsidiary or affiliated corporation (if any), of the Offerer or said Parent Corporation, or any of the Offerer's officers or principal members, shareholders or investors, or other interested parties been adjudged bankrupt, either voluntarily or involuntarily, within the past ten (10) years?

_____ Yes _____ NO
If YES, provide the following information:

Under what name had bankruptcy been adjudged? _____

Date of Bankruptcy _____ Place _____

Has the Offerer or anyone referred to in the previous question been indicted for or convicted of any felony within the past ten (10) years?

_____ Yes _____ NO
If YES, provide the following information for each case and attach any additional information deemed necessary to adequately explain the response.

Charge _____ Date of Charge _____

Court and Location _____

Action Taken _____

FINANCIAL REFERENCES

Please provide at least three (3) Bank and/or Financial Institution references.

Company _____
Address _____
City _____ State _____ Zip Code _____
Individual to Contact _____ Phone _____

Company _____
Address _____
City _____ State _____ Zip Code _____
Individual to Contact _____ Phone _____

Company _____
Address _____
City _____ State _____ Zip Code _____
Individual to Contact _____ Phone _____

Company _____
Address _____
City _____ State _____ Zip Code _____
Individual to Contact _____ Phone _____

Company _____
Address _____
City _____ State _____ Zip Code _____
Individual to Contact _____ Phone _____

Company _____
Address _____
City _____ State _____ Zip Code _____
Individual to Contact _____ Phone _____

CERTIFIED FINANCIAL STATEMENT

The financial condition of the Developer, as of _____, 1989, is as reflected in the attached Certified Financial Statement.

Note: Attach a Certified Financial Statement, not more than sixty (60) days old, showing the assets and the liabilities, including contingent liabilities, fully itemized in accordance with accepted accounting standards.

Certified Public Accountant, or person who performed the work on which the attached Certified Financial Statement is based:

Company _____

Address _____

City _____ State _____ Zip Code _____

Individual to Contact _____ Phone _____

BLUE LAKE PARK
DEVELOPMENT OFFERING
REQUEST FOR PROPOSALS

SUBMISSION INSTRUCTIONS

Each interested developer who responds to the Request for Proposals (RFP) is required to assemble the following information into a bound 8 1/2" x 11" format.

1. Developer's Statement of Financial Qualifications.
2. Response to the questions starting on Page 17.

Ten (10) copies of the bound information must be delivered to:

Lillie Walker, Director
Multnomah County
Purchasing Section
2505 SE 11th Avenue
Portland, OR 97202

**Deadline for parties to respond to the Request for Proposals is:
Thursday, September 7, 1989, 2:00 p.m., Prevailing Pacific Time**

Late responses will not be accepted. Responses received after the deadline will be returned unopened.

BLUE LAKE PARK
DEVELOPMENT OFFERING

REQUEST FOR PROPOSALS

To facilitate the review by the County Selection Committee (CSC) potential developer(s) must submit their proposals in accord with the following format. Identify each response by the number listed by the question. It is not necessary to retype the entire questions with each response.

1. Project Concept

- 1.1 Discuss the Development Proposal for the facility. Include a discussion of your marketing strategy, and describe any special restrictions you will have on facility operations.
- 1.2 Discuss how your Development Proposal meets the County's Development Objectives. (See Pages 1 & 2.)
- 1.3 Identify the specific role each member of your Development Management Team will play during the planning, design, and construction phase of the project. Include a description of the work all consultants will perform during this phase of the project.
- 1.4 Identify the specific role each member of your Operations Management Team will play and the duties they will perform in operating the facility once construction is completed.
- 1.5 If you are proposing to develop the facility in phases, discuss how you will manage and operate the completed phase(s) while construction is progressing on others.

2. Project Design

- 2.1 Submit a preliminary schematic drawing delineating any proposed changes to the preliminary Master Plan. (Utilize an 8-1/2" x 11" format.)
- 2.2 Discuss each component of the facility describing the size, function, and interrelationship. Explain your rationale for each component, how you determined sizing requirements, and the building character you envision.
- 2.3 Discuss how your project design meets the development guidelines established by the County for this project. (Refer to Appendix D - Development Guidelines, Page 30.)
- 2.4 Submit a Project Development Timeline. If you intend to develop the project in phases clearly delineate each construction phase on your timeline. Give projected construction start and completion dates.

3. Project Funding

- 3.1 Give a detailed explanation, including sources of debt and equity financing, of the financing that you plan to use in funding the capital costs of the Development Project. In your explanation you must discuss construction financing, long-term debt financing, operations and marketing financing, and how you will fund start-up costs prior to construction. If funds for the project are to be obtained from sources other than the Developer's own funds, attach evidence of ability to obtain financing.

4. Project Financial Information

- 4.1 Provide a detailed Development Cost Budget. Include a narrative explanation of each budget item and discuss the assumptions you have made in estimating your development costs.
- 4.2 Provide a detailed Operating Cost Budget. Include a narrative explanation of each budget item and discuss the assumptions you have made in estimating your operating costs.
- 4.3 Provide a pro-forma statement that projects the economic performance of the project. Include an explanation of: the assumptions you have made, return on cost, and return on equity. In your explanation you must specifically address assumptions made regarding your revenue projections.
- 4.4 Provide a pro-forma statement showing the financial structure of the capital investment. This statement must include figures for your debt and equity sources, and the project financial requirements. Accompanying this statement must be a narrative explanation of the key assumptions you have made.

5. Developer's Business Offer

- 5.1 Explain what specific financial revenues you are offering Multnomah County. If your proposal includes multiple sources of revenue, discuss each source in detail providing income projections.
- 5.2 Specify your proposed Development Agreement. Explain how your proposed Agreement is related to your project financing.
- 5.3 Explain your proposed minimum Terms of the Development Agreement. Discuss why you think your proposed terms are advantageous for the County.

BLUE LAKE PARK
DEVELOPMENT OFFERING

APPENDIX A
FRAMEWORK PLAN

The following material is taken from the Blue Lake Park Development Plan, November 1985. The Framework Plan designates a variety of land uses for the Blue Lake Properties and is intended to serve as a guide for future development. The following summarizes each component of the Framework Plan. (See Plate 2 - Blue Lake Park Framework Plan, Page 21.)

PARCEL A - BLUE LAKE PARK

This land includes the existing 60 acre park area, and an additional 22 acres (Parcel A-1). This area is to continue as a family-oriented regional recreation facility. A detailed Master Plan has been prepared for future development within this 82 acre site. (Refer to Appendix B Blue Lake Park Master Plan, Page 22.)

PARCEL A1- INTERPRETIVE AREA

This parcel is to be utilized for the development of an interpretation center focusing on the Lower Columbia Chinook Indian culture. The center will also provide information on the surrounding wetland habitat area which provides the setting.

PARCEL B - MAINTENANCE FACILITIES

Multnomah County Parks and Memorials Maintenance Facilities would continue their operations from this site. No major expansion of these facilities is anticipated at this time.

PARCEL C - LAKE HOUSE CENTER

Formerly a residence, The Lake House has been converted into a meeting/reception center for small groups of 100 people or less. The Framework Plan has allowed for expansion of the facility on the present site. The County currently leases the facility to a concessionaire who is responsible for renting the facility to interested parties.

PARCEL D - RECREATIONAL VEHICLE PARK

Set in approximately 27 acres adjacent to Marine Drive this proposed 176 unit facility is intended to be compatible with other adjacent land uses. The RV site will assist Blue Lake Park in becoming a destination park for tourists traveling I-84.

PARCEL E - GOLF COURSE FACILITY

Approximately 43 acres, this parcel is to be utilized for developing a nine hole golf course, driving range, and accompanying facilities. The site also has made an allowance for developing 15 single-family home lots. The area set aside for these lots will be held by the County until such time as the market will allow the County to develop these lots for sale to private individuals. The existing wetlands portion of this parcel will be incorporated into the buffer zones between the golf fairways.

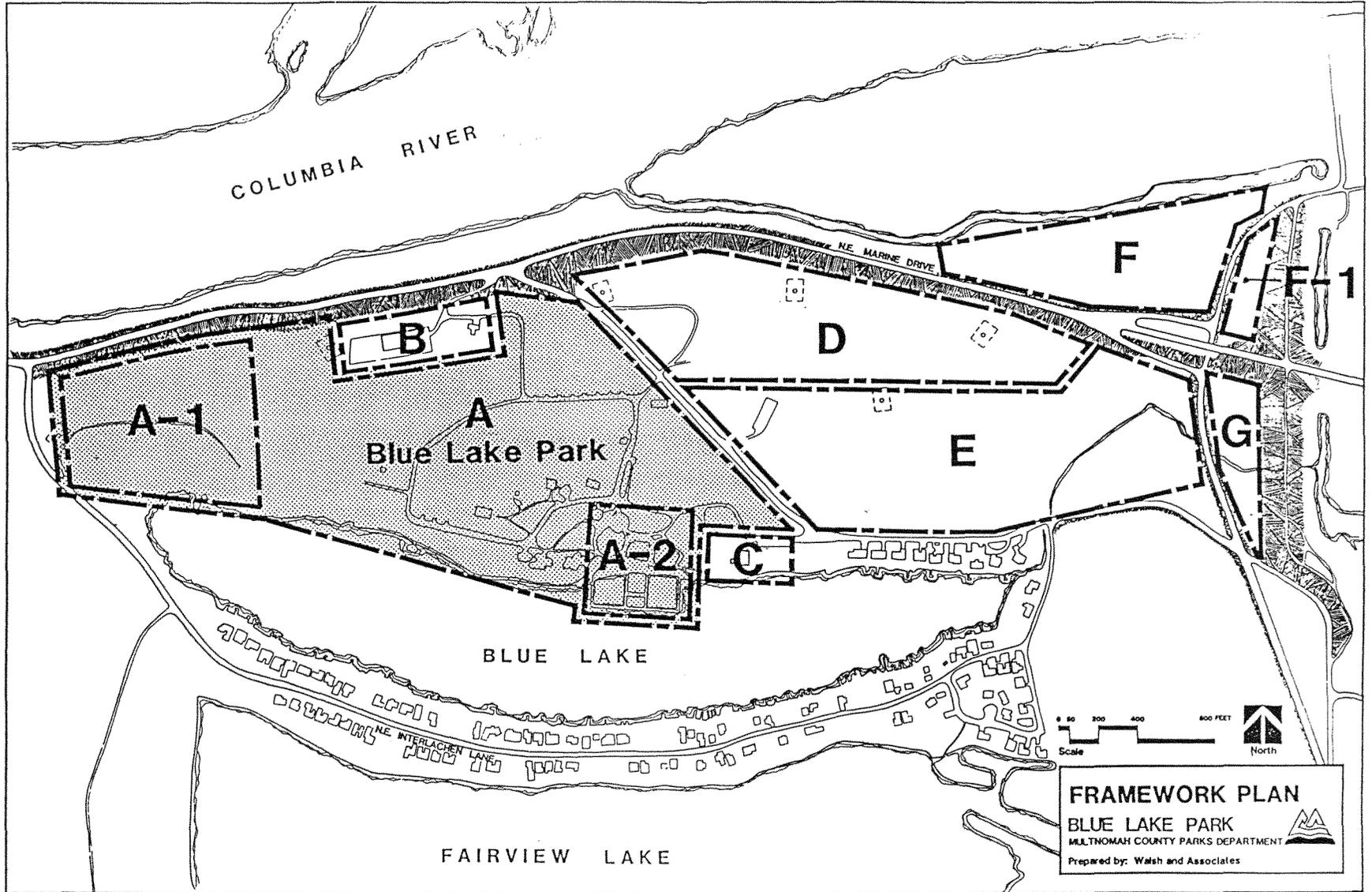
PARCEL F

Parcel F (15 acres) and F1 (5 acres), along with the privately owned riverfront property to the north, have been identified as having excellent potential as a boat launch facility and public river access area. These parcels will be held in reserve until additional properties can be acquired and development opportunities arise.

Parcel G

The Framework Plan recommends the northern portion of this 10 acre parcel should be reserved for an eventual eastbound on-ramp from 223rd to Marine Drive. An area directly south of the proposed on-ramp should be retained for future commercial use, while the plan recommends the southern portion of the parcel be retained in its current wildlife habitat condition.

PLATE 2
BLUE LAKE PARK FRAMEWORK PLAN



FRAMEWORK PLAN
BLUE LAKE PARK
MULTNOMAH COUNTY PARKS DEPARTMENT
Prepared by: Walsh and Associates

BLUE LAKE PARK
DEVELOPMENT OFFERING

APPENDIX B

BLUE LAKE PARK MASTER PLAN

As part of the Blue Lake Park Development Plan, November 1985, a Master Plan was prepared for the existing park area and the adjacent property to the west. (See Plate 3 - Blue Lake Park Master Plan, Page 24.) This Master Plan details the proposed improvements to existing park facilities and the construction of new ones. While the plan is conceptual, the components have been carefully studied and serve as the basis for future park development. However, the County does not make any implied or expressed guarantees to potential developer(s) of the recreational vehicle park facility that the proposed components of the Blue Lake Park Master Plan will be built exactly as described. The following is a summary of the plan's major features.

OPEN SPACE

The layout of the park establishes two major open spaces. Both areas would be utilized for field sports activities. The western open spaces can be easily controlled, allowing for special events such as concerts and major group picnics.

GROUP PICNIC AREAS

Group picnic facilities are to be provided in the areas shown. As currently operated, these areas would be available on a fee basis by reservation. The areas shown total 7 acres which represent a 30% increase over the present group picnic facilities.

FAMILY PICNIC AREAS

The areas indicated incorporate those sites presently utilized plus an additional 7 acres extending west along the Blue Lake shoreline.

INTERPRETIVE AREA

The western portion of this area, 9.5 acres, is to be utilized as wetlands wildlife habitat, setting the environment for the interpretation center which focuses on the Lower Columbia Chinook Indian culture.

SWIMMING AREA

A new half-acre sand swimming beach with an adjacent 1 acre lawn area for sunbathing has been established to replace the present swimming facility. A swim building, court sports are other attractions located in this area.

KID'S CENTER

A major new proposed facility is the Kid's Center. It will provide an exciting environment that will be an attraction for children while being comfortable and inviting for parents.

WATERFRONT DOCKS

The waterfront docks will serve as an extension of the proposed Garden Building. Decks and connecting stairs will provide easy access to the existing concession, a popular attraction with park users. Additional plantings and water fountains will provide visual interest to the area.

THE GARDENS

Forming the hub of the new proposed Lake Center, the existing Swim Center building will be renovated to provide several new uses. Stretching from the park entry to a new plaza on the east side of the building, a floral garden will be developed as a feature attraction for the East Multnomah County area.

LAKE HOUSE CENTER

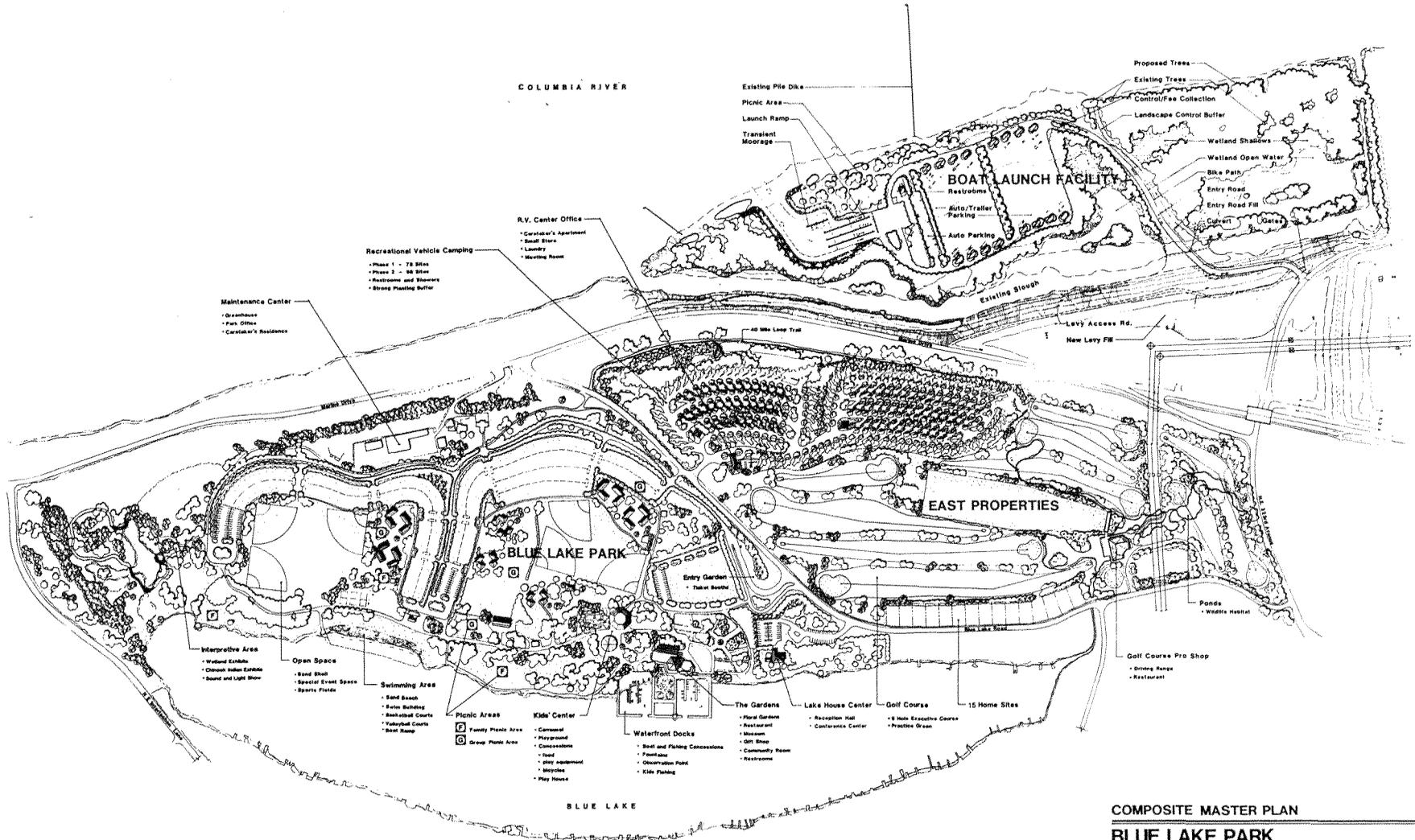
The existing facility which provides meeting and reception space, will be expanded to attract a broader range of user groups and produce more revenue for the County.

ENTRY GARDEN

This area entrance to Blue Lake Park will be a showplace for annual floral displays, and allow for a greater number of park users to to enter and exit the park.

MAINTENANCE CENTER

This existing maintenance center facility will be retained at its present location. The only anticipated expansion is the construction of a new greenhouse.

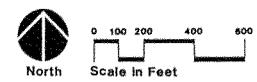


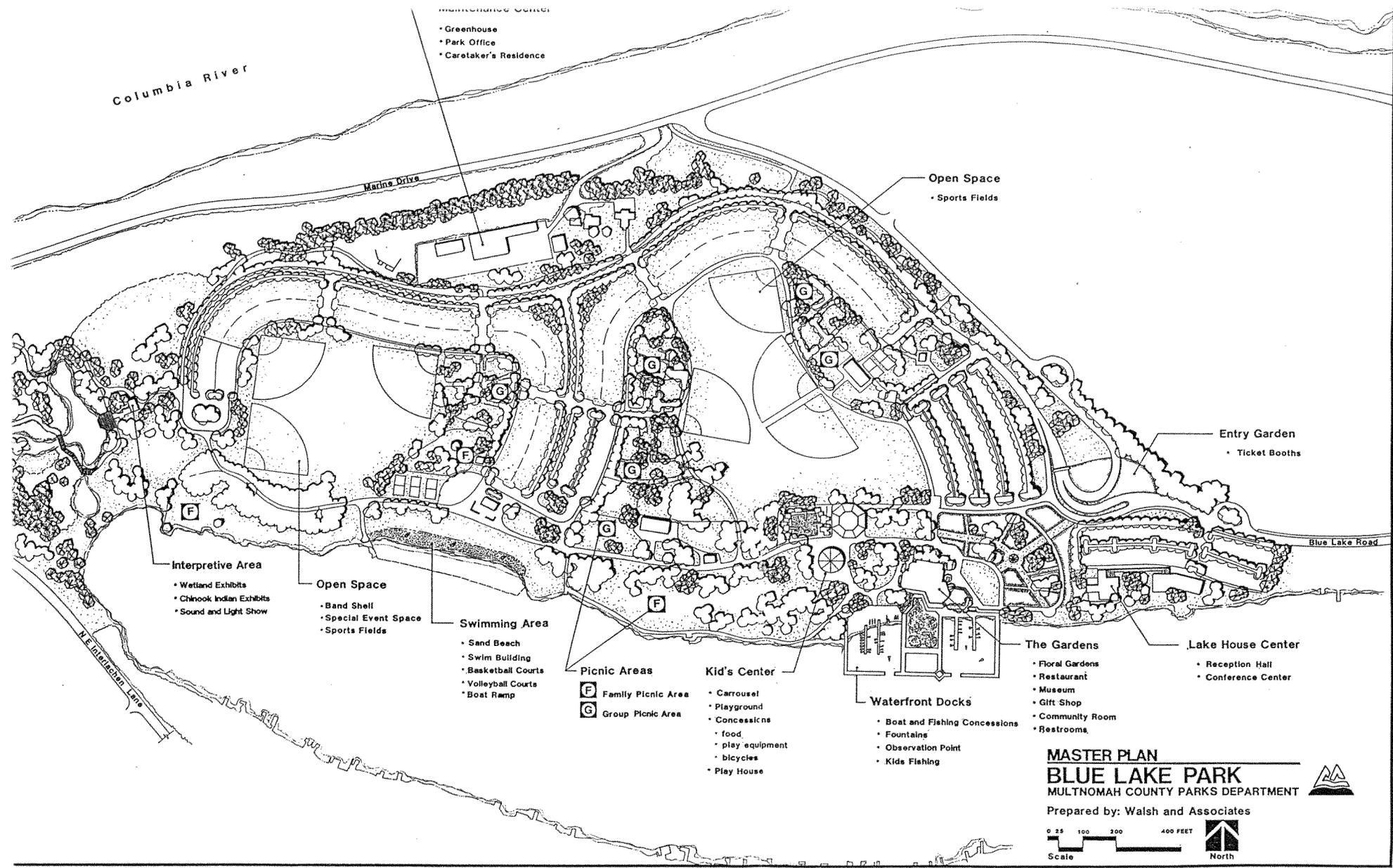
COMPOSITE MASTER PLAN
BLUE LAKE PARK
EAST PROPERTIES
BOAT LAUNCH FACILITY
MULTNOMAH COUNTY PARKS DEPARTMENT



PREPARED BY J. D. WALSH & ASSOCIATES, INC.

11/30/87





MAINTENANCE CENTER
 • Greenhouse
 • Park Office
 • Caretaker's Residence

Columbia River

Marine Drive

Open Space
 • Sports Fields

Entry Garden
 • Ticket Booths

Blue Lake Road

N.E. Multnomah Lane

Interpretive Area
 • Wetland Exhibits
 • Chinook Indian Exhibits
 • Sound and Light Show

Open Space
 • Band Shell
 • Special Event Space
 • Sports Fields

Swimming Area
 • Sand Beach
 • Swim Building
 • Basketball Courts
 • Volleyball Courts
 • Boat Ramp

Picnic Areas
 F Family Picnic Area
 G Group Picnic Area

Kid's Center
 • Carousel
 • Playground
 • Concessions
 • food
 • play equipment
 • bicycles
 • Play House

Waterfront Docks
 • Boat and Fishing Concessions
 • Fountains
 • Observation Point
 • Kids Fishing

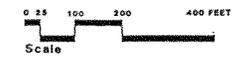
The Gardens
 • Floral Gardens
 • Restaurant
 • Museum
 • Gift Shop
 • Community Room
 • Restrooms

Lake House Center
 • Reception Hall
 • Conference Center

MASTER PLAN
BLUE LAKE PARK
 MULTNOMAH COUNTY PARKS DEPARTMENT



Prepared by: Walsh and Associates



BLUE LAKE PARK
DEVELOPMENT OFFERING

APPENDIX C
EAST PROPERTIES MASTER PLAN

As part of the Blue Lake Park Development Plan, November 1985, a Master Plan was prepared for the eastern portion of the Blue Lake Properties, known as the East Properties. This Master Plan (see Plate 4 - East Properties Master Plan, Page 26), details the proposed development of a 176 unit recreational vehicle park, a nine hole golf course with driving range, and accompanying facilities, and 15 single-family home sites. While the Master Plan is conceptual, the components have been carefully studied and serve as the basis for the County's intention to select private developer(s) for constructing and operating these facilities. The following is a brief summary of the plan's major features as described in the Development Plan.

RECREATIONAL VEHICLE PARK

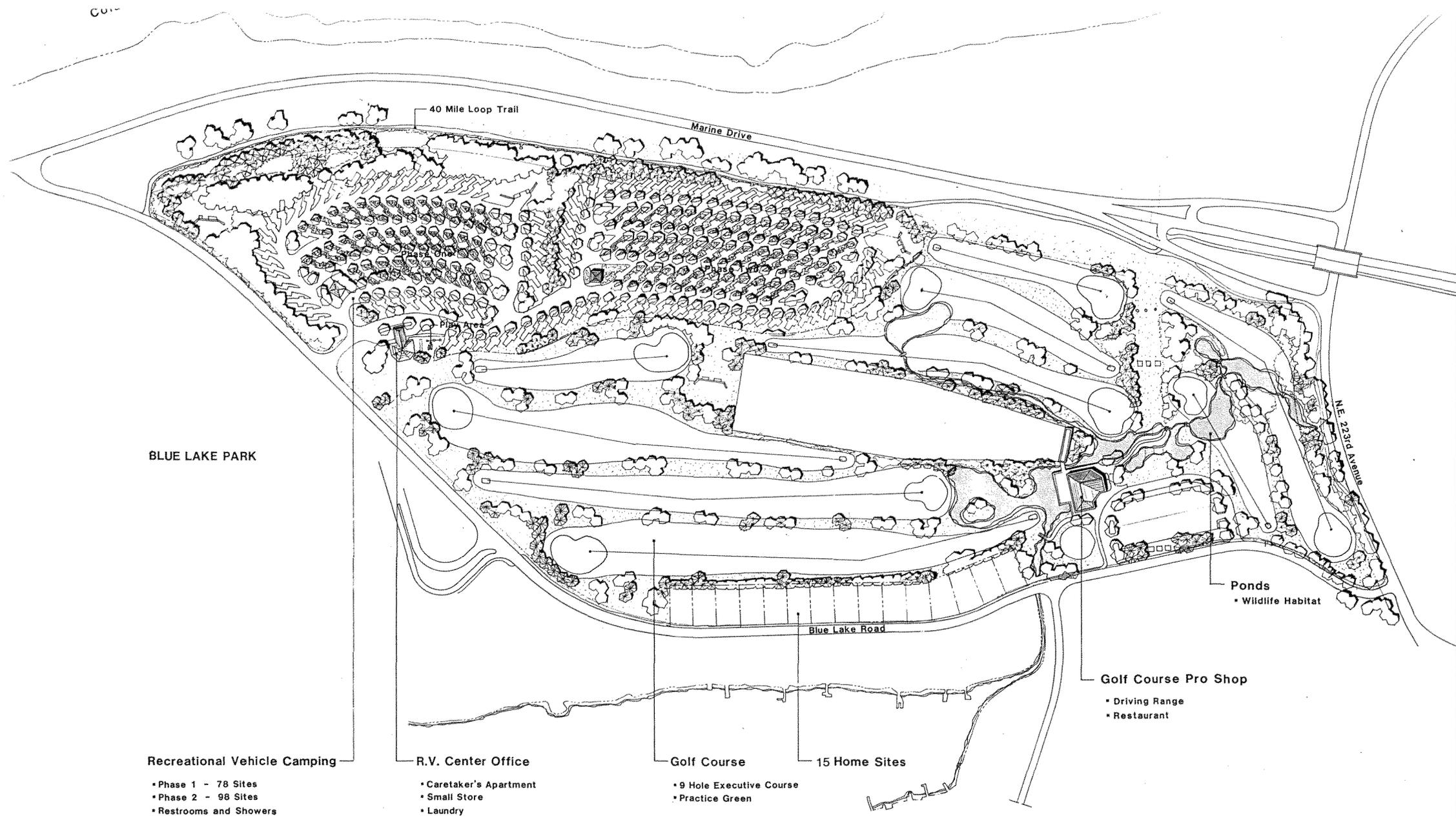
On the northwestern portion of the East Properties, adjacent to Marine Drive, a Recreational Vehicle Park is proposed. The 27 acre site provides space for 176 sites with generous perimeter buffer planting and interior landscaping. Two restroom and shower buildings will be conveniently located on the site. Approximately 50% of the sites will have full services (electrical hook-up, sewer, water, and cable television), while the remaining sites will have partial services. A central control building located on the entry road will provide space for a park office and security station, caretaker's apartment, laundromat, showers and a small convenience store.

NINE HOLE GOLF COURSE AND DRIVING RANGE

Within the central and eastern portion of the East Properties, 43 acres have been designed to accommodate the proposed nine hole golf course and driving range. The Master Plan illustrates a 2,300 yard course utilizing water elements as special features and hazards. Wildlife habitat will be established between the fairways and the enlarged water features. A driving range will be established near N.E. 223rd Avenue. The golf course pro shop will feature a small restaurant and serve as the control point for both the golf course and driving range. A 100 car parking area and practice green complete the support facilities.

HOME SITES

The Master Plan illustrates 15 private single-family home sites that will be offered for sale. The 7,500 square foot lots will be fully serviced by utilities along Blue Lake Road. Blue Lake Road itself will be widened and improved before the homesites are put on the market. It is not anticipated that the homesites will be developed until the golf course and supporting facilities are fully operational and the market for homesites improves.



BLUE LAKE PARK

Recreational Vehicle Camping

- Phase 1 - 78 Sites
- Phase 2 - 98 Sites
- Restrooms and Showers
- Strong Planting Buffer

R.V. Center Office

- Caretaker's Apartment
- Small Store
- Laundry
- Meeting Room

Golf Course

- 9 Hole Executive Course
- Practice Green

15 Home Sites

Golf Course Pro Shop

- Driving Range
- Restaurant

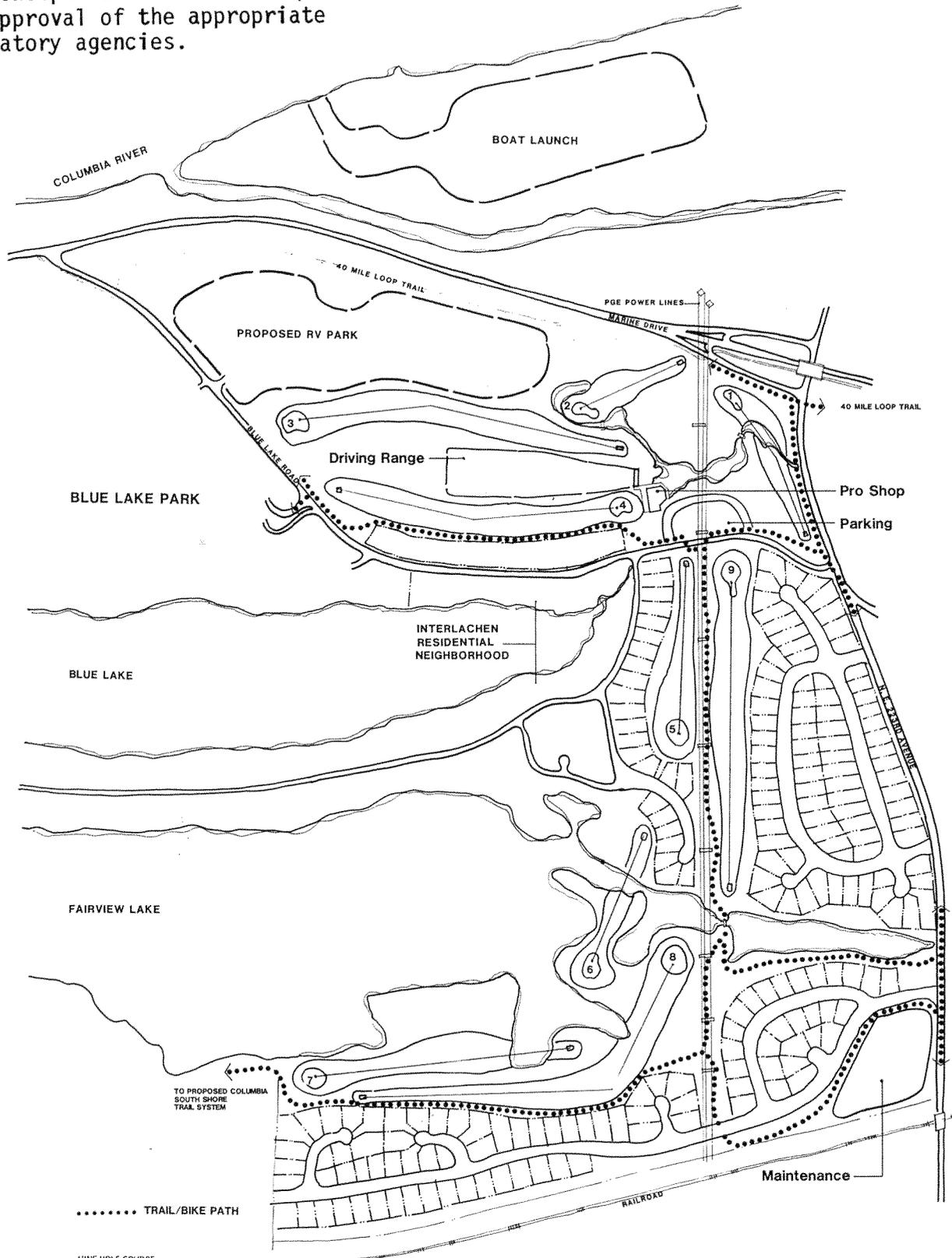
Ponds
▪ Wildlife Habitat

MASTER PLAN/BLUE LAKE PARK
EAST PROPERTIES
 MULTNOMAH COUNTY PARKS DEPARTMENT



Prepared by: Welch and Associates

This illustration is intended to depict only one potential concept. Any concept selected will require the approval of the appropriate regulatory agencies.



THINE HOLE COURSE

Hole	Yardage
1	250
2	166
3	516
4	450
5	266
6	216
7	400
8	633
9	500
TOTAL	3397

LOTS

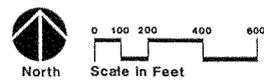
TOTAL	193
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DEVELOPMENT OPTION:
NINE HOLE COURSE (SCHEMATIC PLAN)

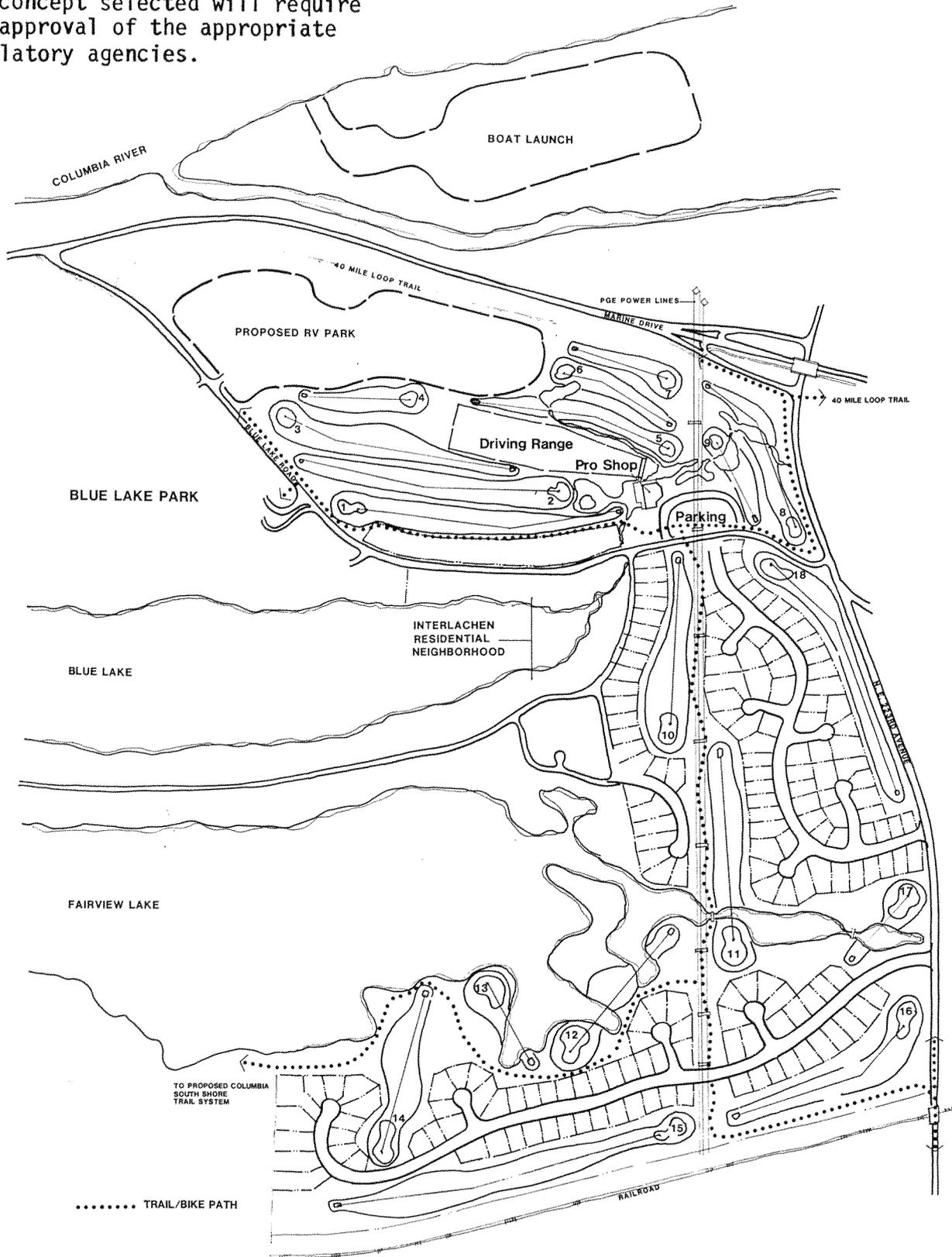
BLUE LAKE GOLF & RESIDENTIAL DEVELOPMENT
MULTNOMAH COUNTY PARKS DEPARTMENT



PREPARED BY J. D. WALSH & ASSOCIATES, INC. 6/21/89



This illustration is intended to depict only one potential concept. Any concept selected will require the approval of the appropriate regulatory agencies.



EIGHTEEN HOLE SHORT COURSE

GOLF COURSE			
Hole	Yardage	Hole	Yardage
1	416	10	266
2	416	11	300
3	366	12	250
4	166	13	133
5	316	14	260
6	200	15	533
7	150	16	316
8	260	17	133
9	133	18	416
TOTAL	2429	TOTAL	2607

LOTS	
TOTAL	165

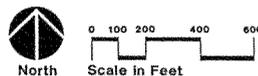
DEVELOPMENT OPTION:
EIGHTEEN HOLE SHORT COURSE (SCHEMATIC PLAN)

**BLUE LAKE GOLF
& RESIDENTIAL DEVELOPMENT**
MULTNOMAH COUNTY PARKS DEPARTMENT

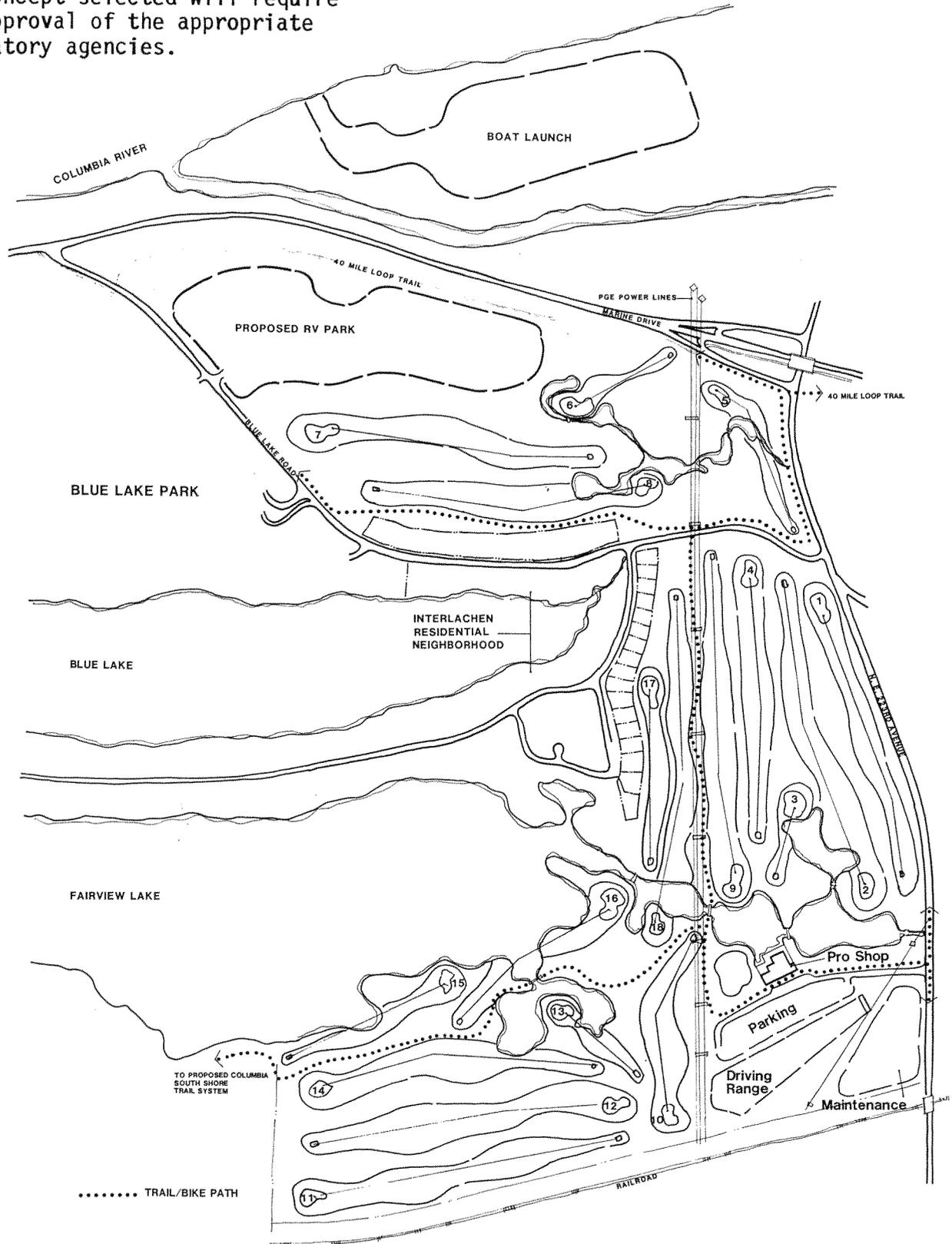


PREPARED BY J. D. WALSH & ASSOCIATES, INC.

6/21/89



This illustration is intended to depict only one potential concept. Any concept selected will require the approval of the appropriate regulatory agencies.



EIGHTEEN HOLE COURSE

GOLF COURSE			
Hole	Yardage	Hole	Yardage
1	433	10	300
2	513	11	500
3	400	12	400
4	400	13	160
5	250	14	450
6	183	15	283
7	416	16	300
8	433	17	300
9	533	18	533
TOTAL	3561	TOTAL	3232

LOTS	
TOTAL	17

DEVELOPMENT OPTION:
EIGHTEEN HOLE COURSE

(SCHEMATIC PLAN)

**BLUE LAKE GOLF
& RESIDENTIAL DEVELOPMENT**
MULTNOMAH COUNTY PARKS DEPARTMENT

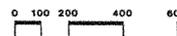


PREPARED BY J. D. WALSH & ASSOCIATES, INC.

6/21/89



North



Scale in Feet

BLUE LAKE PARK
DEVELOPMENT OFFERING

APPENDIX D
DEVELOPMENT GUIDELINES

Attention must be given to the following development criteria: 1) Utility Easements, 2) Water Features, 3) Landscaping, and 4) Trail Access.

Utility Easements. The City of Portland through an Intergovernmental Agreement with Multnomah County has constructed within the golf course development area a permanent water well to service the City of Portland water system. The well site has a permanent easement of 90 feet by 120 feet. Furthermore, the County agreed that, "...within 100 feet of any water production or test well, the construction of any surface or underground structures, permanent or temporary, or the storage of any materials shall be subject to the approval of the Oregon State Health Division and shall conform to all State and Local health regulations."

All construction documents prepared for the Blue Lake Golf Course must respect this easement agreement. In addition to the well site easement, the City of Portland has also been granted a permanent waterline easement. The width of the waterline easement shall be twenty (20) feet. The City of Portland was also granted a permanent access road easement to the water well site. The width of the permanent access road easement shall be thirty (30) feet within fifteen (15) feet of each side of the roadway/centerline.

Portland General Electric (PGE) currently maintains high voltage overhead service lines that are located within the golf course Development Area. PGE has a legal 100 foot easement to maintain these lines. In discussions with PGE officials, any future development must respect this easement. Fairways may be constructed underneath the power lines and rough grass areas may be planted. Trees may or may not be allowed within this easement and PGE must have a minimum of 30 feet, fifteen feet from the centerline of the power lines in each direction, to allow service vehicle access.

The selected developer must submit their Development Plan to Mr. John T. Wiitala, Principal Transmission Engineer, Portland General Electric, 121 SW Salmon Street, Portland, OR 97204, for approval. Mr. Wiitala will oversee the PGE review process and insure that the developer receives the appropriate authorization from PGE. Mr. Wiitala has reviewed the preliminary Master Plan prepared for the East Properties and foresees no potential problems.

GOLF COURSE

Water Features Currently the outfall for Blue Lake occurs within the golf course development area. The preliminary Master Plan prepared for the East Properties has accommodated this hydrologic function by expanding existing on-site water features and proposing new ones. Certain portions of the golf course area (in the vicinity of the Blue Lake outfall) will likely meet the criteria of "wetlands." As such, filling/alterations of these areas will be subject to federal regulations. Any alterations to the Master Plan for the golf course facility, proposed by interested developer(s), must accommodate the existing hydrologic functions of Blue Lake.

The existing water features of the site also serve as the habitat for various forms of wildlife. It is the intention of Multnomah County that the selected developer will design any new water features and develop the existing on-site water features to encourage the continued existence of these wildlife habitat areas.

Landscaping The golf course shall be designed with a generous landscaped perimeter. A detailed landscape planting plan, utilizing native plant material to the extent possible, shall be prepared, identifying the type and size of plant material to be planted. This plan shall be submitted to the Multnomah County Parks Division for review and approval prior to the developer making an application for the project building permit. Course design shall meet minimum standards as set out by the United States Golf Association.

Trail Access Trail access shall be provided along Blue Lake Road and N.E. 223rd for connecting the golf course facility to the existing 40 Mile Loop Trail system. Trail design and construction materials shall be approved by the Multnomah County Parks Division prior to the developer making an application for the project building permit.

RV PARK

State of Oregon Guidelines

In planning the RV Park, attention must be given to the Oregon Administrative Rules, Chapter 33, Division 31 - Health Division standards for Construction, Operation and Maintenance of Recreation Parks. Multnomah County and the City of Fairview will require that these guidelines and codes as described in Division 31 are incorporated into construction documents for the RV Park. Interested parties should also be aware of the proposed development guidelines for Recreation Parks and Organizational Camps drafted by the Oregon Department of Commerce, dated June 18, 1986. While these guidelines have not yet been adopted, they are currently being reviewed and it is anticipated that they will become law before the Blue Lake RV Park is constructed. Specific questions about the proposed guidelines should be addressed to Mr. John Hollingsworth, State of Oregon, 503-378-5013.

Multnomah County Guidelines

In addition to meeting the guidelines established by the State of Oregon, Multnomah County is requiring that the following items be incorporated into the RV Park design.

- 1) **Vehicle Parking Pads.** All sites must have a paved surface. Asphaltic concrete, concrete pavers, or other such acceptable materials must be used.
- 2) **Picnic Tables.** Each camping site shall be equipped with a picnic table securely fastened to the ground.
- 3) **Cooking Grills.** Each camping site shall be equipped with a cleanable metal cooking grill. The grill shall be designed to permit easy removal of ash. Each grill must be a permanent fixture.
- 4) **Water Supply.** Each camping site equipped with a sewer connection shall have an individual water supply source. All State codes must be complied with in providing the water source. Sites not equipped with sewer connections must meet the minimum code requirements for supplying potable water.
- 5) **Sewage Disposal.** On-site facilities shall be provided for a portion of the total number of camping sites. Working within the limitations of the RV Park site (see Appendix F - Proposed Utility Improvements, Page ____), it is the responsibility of the interested developer to propose what percentage of the individual sites will be equipped with sewage disposal facilities.
- 6) **Sewage Disposal Facility.** The RV Park shall contain at least one sewage disposal facility. This on-site facility must comply with Oregon Department of Environmental Quality Administrative rules governing such facilities.
- 7) **Play Area.** The RV Park shall be designed to incorporate at least one children's play area. The surface material shall be sand, wood chips or other such type suitable material. Play structures shall be securely fastened and treated as permanent fixtures. Play structure design and location to be approved by Multnomah County Parks Division.
- 8) **Laundry Facility.** The RV Park shall incorporate at least one self-serve laundry facility on the site.
- 9) **Park Security.** The perimeter of the RV Park shall be landscaped to provide security between the RV Park and surrounding land uses. The landscape barrier shall be designed to blend in with the surrounding landscape to provide an aesthetically acceptable security barrier. In addition to this requirement, the RV Park developer must provide 24 hour security.

- 10) **Park Landscape.** The RV Park shall be designed with a generous landscaped perimeter. In addition each site shall be landscaped so that the entire RV Park has a park-like setting. The landscape design shall utilize native plant material whenever possible. A detailed landscape planting plan shall be prepared, identifying the type and size of plant material to be planted. This plan shall be submitted to the Multnomah County Parks Division for review and approval prior to the developer making an application for the project building permit.
- 11) **Trail Access.** Trail access shall be provided along Blue Lake Road for connecting the RV Park facility to the existing 40-Mile Loop Trail system. Trails throughout the RV Park shall be a minimum of 6 feet in width and shall be paved with asphaltic concrete or other acceptable materials approved by Multnomah County.
- 12) **Park Amenities.** Multnomah County encourages potential developer(s) to recommend other amenities they feel are necessary to make the Blue Lake RV Park a high quality facility.

BLUE LAKE PARK
DEVELOPMENT OFFERING

APPENDIX E
PROPOSED UTILITY IMPROVEMENTS

In a study prepared by Cooper Consultants, Inc., dated July 30, 1986, a preliminary evaluation of the water and sewer requirements for the golf course were conducted. Interested developer(s) should take into consideration that the following information is preliminary and based on a number of assumptions. The developer's plan for the golf course facility could alter the assumptions made in the report findings. It will be the responsibility of the selected developer to determine the on-site utility requirements for the golf course facility. The developer will be responsible for engineering and constructing all on-site utility lines necessary to provide service to the golf course facility.

Water Requirements. The existing water supply to the area is provided by a 10-inch diameter main from the City of Fairview which extends north and west along Blue Lake Road to Interlachen Lane and then south along the lane about 800 feet.

Domestic water needs for the golf course can be provided by a direct tap, probably two-inch, on the existing 10-inch line. Fire protection will require the installation of a fire hydrant connected to the existing 10-inch line. The golf course irrigation water needs are anticipated to be provided by an on-site well.

The selected developer will be responsible for constructing the two-inch line from the existing waterline along Blue Lake Road, installing the required fire hydrant, and the on-site well to supply water needs for irrigating the golf course. All water systems constructed by the selected developer shall comply with the Oregon State Health Division Administrative Rules for Public Water Systems. All City of Fairview Water Service Fees for the golf course facility will be paid by the developer.

Sewer Requirements The existing sewer service in the area is provided by an 8-inch diameter gravity sewer in Blue Lake Road, extending from the entrance of Blue Lake Park to Interlachen Road, where it connects to a 12-inch sewer flowing southward. Blue Lake Park has a gravity sewer system which flows to an on-site pump station that pumps the sewage to the sewer line in Blue Lake Road.

Cooper Consultant's study proposed to install a small pumping station in the golf course area just north of the intersection of Blue Lake Road and Interlachen Lane. This pump station would serve the golf course clubhouse and would pump into the existing manhole in the road intersection.

This recommendation was based on an earlier Master Plan for the East Properties which planned for a greater number of single-family home lots. Since the time this study was conducted, the Master Plan for the East Properties has been revised. Therefore, depending on the finish floor elevation of the Golf Course Clubhouse, a small sewage pump station will or may not be required.

The selected developer must determine the on-site disposal requirements for this project and will be responsible for all on-site sewage disposal system construction and sewage service fees assessed by the City of Fairview or the City of Gresham.

Electrical Service Existing Blue Lake Park facilities are serviced by Portland General Electric. Service access is from power lines running along Blue Lake Road. There have not been any preliminary studies conducted in regards to the power requirements for the golf course facility. It is the responsibility of interested developer(s) to assess the power requirements in accord with the developer's plan for the golf course, driving range, and accompanying facilities. Multnomah County will require that all power lines servicing this project be underground.

BLUE LAKE PARK
DEVELOPMENT OFFERING

APPENDIX F
PROJECT FILE

The following documents are on file at the Multnomah County Parks Division, 1620 SE 190th Avenue (248-5050). Developer(s) may review the documents on an appointment basis.

- Resolution by Board of County Commissioners adopting Development Plan
- Blue Lake Park Development Plan
- Memorandum on East Properties Tax Assessment
- Oregon Administrative Rules - Division 31: Construction, Operation and Maintenance of Recreation Parks
- Preliminary Evaluation of the Water and Sewer Requirements for the Blue Lake Project - Study conducted by Cooper Consultants
- Map of Water Well Locations - City of Portland
- City of Fairview Land Use Approvals.
- Touche Ross Preliminary Feasibility Study

PERSONS INTERESTED IN REVIEWING THIS MATERIAL SHOULD CONTACT:

Ms. Nancy Chase
Multnomah County Park Planner
Multnomah County Parks Division
1620 SE 190th Ave.
Portland, OR 97233

(503) 248-5050

TO: DAILY JOURNAL OF COMMERCE

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: September 5, 1989 at 2:00 P.M.

Proposal No. RFO# 900505

Sealed proposals will be received by the Director of Purchasing, 2505 S.E. 11th Ave., Portland, OR 97202 for:

Request for Qualifications for Furnishing Assessment &

Taxation System Software Package

Multnomah County reserves the right to reject any or all proposals.

Specifications may be obtained at: Multnomah County Purchasing Section

2505 S.E. 11th Avenue

Portland, OR 97202

(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: July 20, 1989



MULTNOMAH COUNTY OREGON
Assessment and Taxation

REQUEST FOR QUALIFICATIONS

RFQ #900505

OPEN/CLOSE DATE: SEPTEMBER 5, 1989

JULY, 1989



MULTNOMAH COUNTY OREGON
Assessment and Taxation

REQUEST FOR QUALIFICATIONS

RFQ #900505

OPEN/CLOSE DATE: SEPTEMBER 5, 1989

JULY, 1989

INVITATION FOR RFQ #900505 To be opened 2 P.M., September 5, 1989.

SEALED PROPOSALS will be received by the Purchasing Director of Multnomah County in the Ford Building Lobby, 2505 SE 11th Avenue, Portland, Oregon 97202, until 2 P.M. Pacific Time and will be publicly opened and read for

ASSESSMENT AND TAXATION SYSTEM SOFTWARE PACKAGE.

To insure proper RFQ identification and handling, mark the outside of each package or envelope with the RFQ number appearing above.

Also the constitutional debt limitation for counties requires any county contract which extends beyond the current fiscal year to be executed subject to future appropriations to fund its provisions, and contract documents will reflect this condition.

Pursuant to Multnomah County Administrative Rules, the County may, in its discretion, waive the bid security requirements of ORS 279.033 for contracts other than those for public improvements. No proposal will be considered unless accompanied by a check payable to Multnomah County, certified by a responsible bank, or in lieu thereof a surety bond for an amount equal to ten percent of the aggregate proposal, unless otherwise specified in the space provided below. The successful bidder may be required to furnish a performance bond satisfactory to the Board in the full amount of the contract.

Surety Bond: Waive

The right is expressly reserved to reject any and all bids.

Dated at Portland, Oregon: July 11, 1989.

Board of County Commissioners
MULTNOMAH COUNTY, OREGON

Publication Dates: July 20, 1989.

By Lillie Walker, Director
Purchasing Section

To the Board of County Commissioners:

The undersigned proposes to furnish the services herein mentioned at the unit price indicated, all in accordance with the specifications and provisions as herein above set forth, attached hereto and made a part hereof.

The undersigned proposer hereby represents as follows: That this proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects fair and without collusion or fraud.

Accompanying this proposal is a Waived in the
("Certified Check" or Surety Bond")
amount of N/A Dollars (\$ N/A) which is not less
than ten percent of the total amount of this bid.

(Signature of bidder) _____
Legal name of firm or corporation

By _____
(Name)

Dated _____, 198__.

(Title)

Address _____

METHOD OF AWARD

Award will be made to the bidder submitting the lowest responsive bid. The award will be made on an all-or-none basis or a split award as in the best interest of the County. The right is expressly reserved to reject any or all bids.

CLARIFICATION

Any vendor requiring clarification of the information or protesting any provision herein, must submit specific comments in writing to:

Roger Bruno
2505 SE 11th Avenue
Portland, OR 97202

A written response will be provided to those questions which are deemed appropriate, copies of which will be sent to all vendors in receipt of this RFQ. Questions will not be answered verbally except those which would clarify specifications and requirements of this RFQ and as further provided herein. However, any actions or changes resulting from these communications will be forwarded to all bidders as an addendum to this RFQ.

Oral instructions or information concerning the specifications for the projects or requirements given out by County officers, employees, or agents to prospective bidders shall not bind the County. Any addenda shall be issued by the Purchasing Director not later than five (5) days prior to bid opening.

CANCELLATION

Multnomah County reserves the right to cancel award of the contract at any time before execution of the contract by both parties if cancellation is deemed to be in Multnomah County's best interest. In no event shall Multnomah County have any liability for the cancellation of award. The bidder assumes the sole risk and responsibility for all expenses connected with the preparation of its bid.

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I. INTRODUCTION

A. COUNTY ORGANIZATION

Multnomah County is a "home rule" charter county government providing services to a population of over 560,000 residents. The charter enables the County to enact local legislation on matters of County concern consistent with the Oregon Constitution and general laws. The County seat is Portland, the largest city in Oregon. Other incorporated cities are Gresham, Troutdale, Fairview, Wood Village and Maywood Park.

B. ASSESSMENT AND TAXATION

The County's Division of Assessment & Taxation (A&T) appraises and bills for property tax on all real and personal property, and bills for centrally assessed property within its boundaries. Its automation needs are supported by the County's Information Services Division (ISD), which is sponsoring this project to upgrade and modernize the information systems A&T uses. The existing systems consist of a variety of computers and applications, some as old as 20 years. The system components do not work well together, are unreliable, are costly to maintain, and do not meet all A&T's needs.

In addition to supporting users on staff at A&T, the system provides direct access to several title insurance company users and various other city and county agencies, and provides no online update capability, except

for characteristics. The system currently accomodates approximately 350,000 accounts, distributed as follows: 250,000 residential property, 50,000 personal property and 30,000 commercial property accounts.

C. PURPOSE OF THE RFQ

A&T and ISD have just completed a cooperative Requirements Definition Project which identified information needs and established strategy for upgrading A&T's systems. Some products of the project appear as Appendices A-G to this RFQ. The project resulted in identification of a number of applications for replacement. The County is now in the process of determining whether to purchase packaged software to meet these needs or whether it must undertake custom development projects. This RFQ is designed to elicit from vendors information on commercially available software to aid the County in deciding whether it can satisfy its needs through the purchase of packaged software.

Hardware is not a part of the procurement that may result from this RFQ. Any mainframe-based software purchased will run in an IBM environment on the County's Amdahl CPU. Technical constraints appear in Section VII of this RFQ.

II. ACQUISITION SCHEDULE

The following preliminary list of activities and dates is provided for vendor's general information. It is tentative and subject to change.

<u>Activity</u>	<u>Date</u>
1. Distribute RFQ	July 20, 1989
2. Deadline for Questions and Comments on RFQ	August 10, 1989
3. Deadline for Receipt of Statements of Qualifications	September 5, 1989
4. Complete Evaluation of Statements of Qualifications; Announce Results	To Be Announced
5. Issue Request for Proposals (if necessary)	To Be Announced

III. CONDITIONS FOR SUBMISSION OF STATEMENTS
OF QUALIFICATIONS

A. REQUESTS FOR ADDITIONAL INFORMATION; PROTESTS

Any vendor requiring clarification of the RFQ, or protesting any of its provisions must submit specific comments in writing to:

Multnomah County
Director of Purchasing
2505 SE 11th Avenue
Portland, Oregon 97202

The deadline for submitting such questions or comments is indicated in the schedule in Section II of this document. If, in the opinion of the Director of Purchasing, additional information or interpretation is necessary, such information will be supplied in the form of addenda which will be delivered to all individuals, firms, and corporations having taken out specifications and such addenda shall have the same binding effect as though contained in the main body of the specifications. Oral instructions or information concerning the specifications or the project given out by County managers, employees, or agents to prospective bidders, shall not bind Multnomah County. All addenda shall be issued by the Purchasing Director.

B. TIMELY RECEIPT OF RESPONSES

Vendors are to submit five (5) sealed copies of their response to this RFQ to the above address by 4:00 p.m. local time on the date indicated in the schedule in Section II of this document. Any voluminous reference material supplementing the Statement of Qualifications (SOQ) may be submitted in single copy. Materials submitted in response to this RFQ become the property of Multnomah County.

Late responses may be returned to senders unopened. Post marking by the deadline will not substitute for actual receipt. The vendor bears the risk of the method of delivery selected.

No changes or alterations to vendors' Statements of Qualifications will be permitted after the deadline for submission. The County reserves the right to seek clarifying detail on vendors' responses, but will not allow modification thereto.

C. RFQ COMPLIANCE

Failure to address any of the requirements or questions contained in the RFQ may subject the entire Statement of Qualifications to rejection. Failure to satisfy specifications labeled "mandatory" will result in disqualification. However, the inability to meet a specific requirement labeled "desirable" or any general condition will not necessarily invalidate the response but will be weighed in the evaluation. Vendors

whose offerings are functionally equivalent to the desirable requirements are encouraged to respond by providing descriptions of how their products meet the intent of the specifications.

D. PERFORMANCE BOND

Not Required.

E. CONTRACT DOCUMENTS

The conditions and specifications of the RFQ and the successful vendor's response thereto, as amended by written agreement of the parties, will be incorporated into any contract resulting from this process. The successful vendor will be contractually bound by any performance representations appearing in responses to the RFQ.

F. CANCELLATION

Multnomah County reserves the right to cancel this procurement at any time before execution of the contract by both parties if cancellation is deemed to be in Multnomah County's best interest. In no event shall Multnomah County have any liability for the cancellation of award. The bidder

assumes the sole risk and responsibility for all expenses connected with the preparation of its response to the RFQ.

IV. EVALUATION PROCESS AND CRITERIA

A. PROCESS

Upon receipt of the Statements of Qualifications, the County will conduct an initial screening for satisfaction of requirements marked mandatory. Offerings which do not meet the mandatory specifications will be eliminated. Those remaining will be evaluated against structured, objective evaluation criteria. A point system will be used to assess how well vendors' packages satisfy each requirement (both mandatory and desirable).

If, after evaluating responses to the RFQ, the County determines that none of the software packages offered meets its needs, it may decide to discontinue the procurement process and develop its own systems, or seek other alternatives. If several vendors offer packages likely to meet A&T's needs, the County may decide to issue each of them a more detailed Request for Proposals (RFP) and continue the competition among these qualified bidders. If the evaluation indicates that a single respondent to the RFQ is likely to meet the needs expressed, the County may execute a sole source contract with that vendor, seek additional information on its products, or request that it submit a more detailed proposal.

B. CRITERIA

The evaluation criteria reflect a wide range of considerations. While purchase price is important, other factors are equally significant.

Careful selection among the variety of products available depends on assessment of features, their design, their impact on A&T and ISD staff, and numerous additional qualitative and quantitative considerations. Consequently, the County may not select the lowest cost solution. The objective is to choose a reliable and experienced vendor capable of providing effective software within a reasonable budget and timeframe.

The evaluation will consider three basic types of criteria:

1. Cost (20% of total points);
2. Vendor's Management Characteristics and Stability (30% of total points);
3. Functional Requirements (50% of total points):
 - a. Satisfaction of itemized specifications
 - b. Overall quality, flexibility, and ease of use.

V. INSTRUCTIONS TO VENDORS--RESPONSE FORMAT

Responses to the RFQ must be submitted in the format specified below:

A. COVER LETTER

The letter should contain a high level summary of your approach and the distinguishing characteristics of your product(s). It must be signed by a company representative authorized to enter contractual obligations.

B. TABLE OF CONTENTS

C. VENDOR IDENTIFICATION AND BACKGROUND

Please list the information requested by 1-3 and answer questions 4-9.

1. Firm Name

Address of Headquarters

City, State Zip Code

Phone Number

2. Address of Nearest Local Support Office

City, State Zip Code

Phone Number

3. Person Responsible for this Statement of Qualifications

Name and Title

Address

City, State Zip Code

Phone Number

4. How long has the company been in business? Please attach its two most recent audited financial statements.

5. How many employees are assigned to support the package(s) proposed? Where are they located?

6. How long has the software being offered to Multnomah County been available?

7. Have there been significant changes to the product within the last year? If so, please describe them.

8. Are new releases of this product planned? If so, what is the expected release date?

9. Is there an active user group for this software? If so, please list a name, address and phone number for a contact person.

D. GENERAL SYSTEM INFORMATION

1. List all the Assessment and Taxation applications, modules, or subsystems you offer.
2. What hardware platform does the software require?
3. Describe the training available for the system offered, including:
 - o Course names, curricula, and summary of contents;
 - o Recommended attendees;
 - o Cost per student;
 - o Location where course is taught;
 - o Cost for in-house presentation for a maximum number of students;
and
 - o Format (lecture, lab, work session, etc.)

Describe training included in the initial purchase price. Give descriptions and costs for additional training.

4. Describe the implementation and conversion assistance you believe will be necessary, and detail the associated costs.
5. Describe the available system and user documentation, and indicate whether it is part of the cost quoted for the package.
6. Describe the software maintenance policies/procedures in customizing

the package to meet individual customer's business requirements. Describe maintenance effects on future releases and costs.

E. DESCRIPTION OF APPLICATION SOFTWARE

For each application, module or subsystem, provide the following information:

1. Please name the application and describe its functions.
2. List the data or data elements the system tracks. (Refer to Appendix D for entity-relationship diagrams, and Appendix F for entity definitions.)
3. Describe the standard reports the system produces; attach samples.

F. RFQ RESPONSES

1. Response to Functional and Technical Requirements

Vendors must address each of the numbered requirements in Sections VI and VII. In Section VII, Technical Requirements, please answer in narrative form the questions asked. In Section VI, Functional Requirements, please respond to each item in the following manner:

- a. Restate the number and requirement as it appears in the RFQ.

b. Indicate whether the product offered satisfies the requirement by stating one of the following:

- "Supported as described" meaning that the product offered completely meets the requirement;
- "Not supported" meaning that the product offered clearly does not satisfy the requirement; or
- "Partially supported" meaning that the package satisfies some portion of the functional requirement, but leaves the remainder unsatisfied.
- "Equivalent available" meaning that while the vendor does not fully satisfy the requirement as stated, it provides some of the required functionality. If functional equivalency is available through enhancement or modification, describe the necessary effort and associated costs.

c. Explain how the requirement is addressed. (Failure to provide this description will result in disqualification.)

Specifications identified with an asterisk (*), stated in a "Please describe" format require only a narrative response; it is not necessary to mark them "Supported as described," etc.

2. Cost Information: Complete appendix I cost summary form.

3. Management Information

a. Experience and References

- List the number of systems the company has installed nationally.
- List the number of assessment and taxation systems the company has installed nationally.
- Provide a complete user list for installed assessment and taxation systems.
- Provide five references for customers comparable to Multnomah County. For each, list:
 - o Name of organization;
 - o Name and title of contact person;
 - o Address and phone number;
 - o Date of installation;
 - o Cost to customer (if available);
 - o List of installed applications;
 - o Number of users; and
 - o Number of active accounts.

b. Business History

- Has the company ever had a contract terminated for default? Has the company ever paid contract liquidated damages to a customer? Is the company currently litigating, arbitrating or negotiating any customer claims? If so, please describe the circumstances.

- Has the company ever withdrawn support of a software product installed at customer sites? If so, please describe the circumstances.

VI. FUNCTIONAL REQUIREMENTS

A. REQUIREMENTS THAT APPLY ACROSS APPLICATIONS OR INDEPENDENT OF SPECIFIC APPLICATIONS

MANDATORY:

- 1.1 Edit for duplicate batch processing.
- 1.2 Provide on-line access to accounts by name, street address, legal description, account number, or state parcel number.
- 1.3 Accommodate mailing addresses in zip plus four form as well as carrier codes.
- 1.4 Aggregate multiple mailings going to a single address.

DESIRABLE:

- 1.5 Provide Soundex (phonetic) search capability for individual person names and street names.
- 1.6* Describe package flexibility in accommodating legislative changes, referenda, special election costs, etc.

*Requires only narrative response.

- 1.7 Report sending date and address to which valuation notice was sent for all property types.
- 1.8 Search database by any parameter (such as all accounts that need to file); describe user defined search capabilities of the system.
- 1.9 Maintain and report audit trail showing record of account transactions, when basic name, address and valuation information was changed and by whom.
- 1.10 Support parameter driven purge criteria for purging accounts records, transactions. How does the system accomplish purges?
- 1.11 Maintain situs address with the following content:

Address Name	A	20.0
Highest Address for this Street Segment	A	6.0
Lowest Address for this Street Segment	A	6.0
Unit Number; Apartment/Trailer Number	A	5.0
Quadrant (i.e., NW, SW, etc.)	A	2.0
Street Type	A	4.0
Address City	A	2.0
Unit Type Designator (i.e., Apartment, Mobil Home Space)	A	2.0
Address Zip Code	A	9.0

- 1.12 Produce schematics and maintain drawings of buildings and other improvements; define dimensions and calculate area.
- 1.13 Allow entry of transactions that have not been manually batched according to date dependency. How does the system sort transactions that are not chronologically sequenced?
- 1.14 Allow entry of multiple interested parties (such as lessor, lessee, petitioner in appeal, owner, taxpaying agent, DBA, etc.) for each piece of property. How many parties does the system provide for?
- 1.15 Provide fields for recording various types of numerical values, such as appraised value, assessed value and taxable value.
- 1.16 Enter and update all data listed in Appendix F, Entity Definitions, for seven (7) years.
- 1.17 Ability to add, update or adjust values on real and personal property (including omitted property) for six years in the past, current year and six years into the future.
- 1.18 Maintain two account numbers for each account, in the following formats:
- A) Format 1 - The County account number is 2 characters for real property, for both Personal Property and Utility. The first character describes the type of property account.

B) Format 2 - STATE ACCOUNT NUMBER

NOTE A								NOTE C				NOTE E					
I	N	2	E	3	6	A	A			9	0	0	I	7	U	2	2
								NOTE B				NOTE D					

- NOTE A: Map Number
- NOTE B: Supplemental Maps
- NOTE C: Parcel Number
- NOTE D: Number of Parcels on the Map
- NOTE E: Special Interest Designator

- 1.19 Display negative values when appropriate.
- 1.20 Maintain value history for each account; maintain and extract multiple values on an account.
- 1.21 Enter and update appraisal notes.
- 1.22 Print appraisal data card for residential, personal and commercial property.
- 1.23 Maintain separate land and improvement values.
- 1.24 Provide integrated data bases/access to data.

- 1.25 Produce various year-to-year comparisons from account history (i.e., values, exemptions/deferrals, name, etc.).
- 1.26 Generate exception reports based on varying parameters, such as large changes in assessed value.
- 1.27 Permit redrawing of appraisal district boundaries; analyze mix of account data in a district.
- 1.28* Describe facility to track and report staff productivity, quality measurement tools.
- 1.29* How does the system number personal property accounts? Are numbers internally generated or externally determined? Are account numbers related to real property account numbers?
- 1.30 Provide a means to easily distinguish inactive accounts.
- 1.31 Allow multiple account numbers for a single legal description for instances in which the land, minerals, and improvements are separately owned or numbered.
- 1.32 Update voucher number/change order number for roll corrections.

*Requires only narrative response.

1.33 Generate various form letters, notices and mailing labels, such as:

- Sales confirmation letters
- Veteran exemption renewal forms
- Personal property filing notices triggered by filing status code
- Miscellaneous notices to any of multiple interested parties

How does the system produce such mailings?

1.34 Flag parcels with special activity (such as blanket petitions, bankruptcy, foreclosures, appeals, audits, exemptions, deferrals, construction) for review outside the regular revalue cycle or for other special handling.

1.35 Provide a means to identify and queue subsequent related batch transactions for an account upon failure in processing a preceeding transaction for that account.

1.36 Accept and write data on magnetic tape, disk, and other electronic media.

1.37 Maintain data on recorded instruments such as deeds; support cross-reference to microfiche.

1.38 Secure unofficial, assessed values from viewing by the public before roll is certified.

- 1.39 Notify users of uncertified assessed values.
- 1.40 Use single (not multiple) accounts for property lying in several taxing districts; extract multiple values for rate making purposes.
- 1.41 Support multiple valuation approaches, such as cost based, market and income.
- 1.42 Provide computer-generated values for a property using different cost models based upon characteristics.
- 1.43 Provide automated follow-up notices (report or on-line) for other work units.

B. CORE APPLICATIONS

1. Residential/Commerical/Industrial Appraisal

In addition to the requirements listed below, refer to pages 8-10 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

- 1.1 For residential: support single family, multi-family, apartment, condominium, mobile home and houseboat characteristics and valuation.
- 1.2 Produce and report change orders or on-line corrections to roll.

- 1.3 Move values from an appraisal work file to assessment roll file upon request.
 - 1.4 Allow appraiser to select next year's value--that is, valuation for multiple years done simultaneously.
 - 1.5 Recalculate value based on location adjustments for both land and building.
 - 1.6 Track deferrals for farm, senior citizens, etc.
 - 1.7 Apply tabular cost values to properties based on type or location code; calculate property replacement values.
 - 1.8* Describe upload/download capability for handheld devices.
 - 1.9 Provide on-line property characteristics inquiry and update.
2. Commercial/Industrial Appraisal (Permanently Affixed Property)

In addition to the requirements listed below, refer to pages 8-10 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

*Requires only narrative response.

- 2.1 For divisions (instances in which property is partitioned), or consolidations:
 - o Record data on all improvements on an account.
 - o Record history of divisions and account numbers.
- 2.2 Support commercial property appraisal with a characteristics record and value calculation.
- 2.3 Maintain characteristics of multiple buildings on single parcel of land.
- 2.4 Interface with building permits and fire bureau to pick up characteristics from their files. Please describe interface capabilities with multiple sources of data.
- 2.5 Flag accounts in which permit issuance may lead to out-of-cycle reappraisal.
- 2.6 Track taxable-nontaxable status.
- 2.7 For commercial/industrial, track confidential income data (rent) and expense data by address and type of property.
- 2.8 Accept calculated exemptions and apply percentage of exemptions for land and improvements when the roll is extended.

2.9 Maintain seven (7) year history of values, multiple values per year.

2.10 Track appeal results.

2.11 Identify when appealed account is divided or consolidated.

3. Sales/Trending

In addition to the requirements listed below, refer to page 8 of Appendix A for processing requirements and to Appendix B for definitions of processes and functions.

3.1 Compile upon request the following information by various criteria such as class of property or neighborhood:

Per year for each of last three years:

- o Total number of accounts
- o Average appraised value
- o Average sale price
- o Number of sales
- o Median assessment ratio
- o Percentage of sales within a neighborhood
- o Age of improvements

Current year only:

- o Total land value per appraisal district
 - o Total improvement value per appraisal district
 - o Total value per district
- 3.2 Apply selective trending factor to specific property types, such as residential or hotels, via automated trending tables.
- 3.3 Apply trending factor to neighborhood or specific property type.
- 3.4 Support the following trending options:
- o Land and improvement separately
 - o Improvements trend calculated from trend for combined less trend for land
 - o Plus or minus a lump sum constant
- 3.5 Define and apply multiple sets of ratio codes.
- 3.6 Respond to multiple tax lot sales for ratio calculation.

3.7 Enter and update the following information:

- Sales data code
- Instrument type (such as deed, contract, etc.)
- Sales price
- Instrument number
- Ratio code

3.8 Provide access to any sale information on account record.

3.9 Produce list of all sales on property by account.

3.10 Provide for on-line selection of comparable sales based on various search criteria; provide cross-reference.

3.11 Calculate various sales ratios based on select criteria.

3.12 Provide current and proposed values by appraisal district.

3.13 Provide comment field on sales files.

3.14 Secure to authorized users certain fields, such as property income.

3.15 Maintain confirmation codes on sold property for generating ratio study and for purposes of comparables.

3.16 Provide statistical analysis capability. Describe statistical and analytical tools available with the system, such as multiple regression, linear feedback, beta coefficients, T-statistic, coefficient of dispersion and variation, etc.

3.17 Update and freeze values and characteristics by sales file year.

4. Assessment, Rate Making, and Tax Extension

In addition to the requirements listed below, refer to page 12 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

Determine Levy Rates:

4.1 Include personal, real and centrally assessed property for a district rate setting.

4.2 Calculate a preliminary rate for each taxing district from the net levy and the total assessed taxable value of properties being assessed for the levy.

4.3 Calculate consolidated levy rate for each levy code area.

4.4 Compare levied amounts with statutory limits.

- 4.5 Use frozen amounts (such as Urban Renewal Districts) as values for rates.
- 4.6 Allow for manual input, rather than calculation, of certain rates (such as Urban Renewal Districts).
- 4.7 Produce report of levy codes and levy rates.
- 4.8 Identify levy codes and associated rates by tax year.
- 4.9 Maintain seven (7) years of levy codes and rates for recalculating and distributing taxes.
- 4.10 Generate summary and detail that list:
 - o Taxing districts
 - o Assessed values for computing tax rates
 - o Tax rate per \$1,000
 - o Offsets
 - o Severance tax
 - o Payments "in lieu of" tax payments (non-tax contributions to taxing authorities)

- o Levy used to compute tax rate
 - o Loss due to truncating
 - o Amount to be raised (rate x value)
 - o Special assessment (such as sewer or street light assessments)
 - o Unzoned farm land
 - o Forest land
 - o Personal property penalties for late filing
- 4.11 Generate table of consolidated tax rates of overlapping taxing districts listing levy code, total rate, and rate per taxing district (such as city, school district, water district, fire district, etc.).
- 4.12 Break levies into increments by special levy, bond, etc.
- 4.13 Calculate centrally assessed property value by levy code by number of wire/track/line miles, acreage and other measures.

Extend Taxes:

- 4.14 Report cancelled deferrals by levy code amount and percentage.
- 4.15 Calculate taxes according to various formulas.
- 4.16 Create trial balances of tax extensions and reporting before roll certification without posting to accounts.
- 4.17 Recalculate rates and rerun the trial balance until authorized levy amounts are reconciled.
- 4.18 Generate report of assessed value and taxes billed by taxing district.
- 4.19 Post taxes to individual personal, real and centrally assessed property accounts.
- 4.20 Create a percentage table for distribution of revenue to taxing districts.

Extend Special Assessments:

- 4.21 Allow for modification to formulae for computation of special assessments.

4.22 Provide reports by district listing taxes billed and basis for tax computation such as acres and rates.

4.23 Compute special assessments according to various formulae.

4.24 Calculate automatically penalties against specific criteria such as value and acreage.

4.25 Modify reports when formulae change or new special assessments are added.

5. Tax Billing, Collections and Accounting

In addition to the requirements listed below, refer to pages 12-15 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

Manage Finances:

MANDATORY:

5.1 Generate tax bills for:

- o Real property;
- o Personal property; and
- o Centrally assessed property.

- 5.2 Accept account numbers on magnetic tape, diskette and other media from external agents such as state agencies and mortgage companies; flag these accounts and generate tax bills, statements to tax payers, etc. to the mortgage companies on magnetic tape, diskette and other media.
- 5.3 Print tax bill forms in zip code, name and address sequence for any account not flagged for mortgage company billing.
- 5.4 Itemize distribution of current year taxes by taxing district.
- 5.5 Calculate revenue distribution to various taxing authorities.

DESIRABLE:

- 5.6 Maintain one mailing address for each taxpayer.
- 5.7 Allow override by an alternative mailing address for a specific receivable account.
- 5.8 Maintain tax payment agent name and mailing address separate from the taxpayer(s) name and mailing address for a specific account.
- 5.9 Identify account by legal or tax roll description.

- 5.10 Support transaction codes; how does the system set up transaction codes?
- 5.11 Process advance payments and suspense transactions.
- 5.12 Credit advance payments to a holding account until application to tax liability is appropriate.
- 5.13 Produce report on aging receivables and credits.
- 5.14 Monitor personal property accounts on which there are payment agreements.
- 5.15 Produce tax bills showing both percentage and rate by taxing district.
- 5.16 Itemize penalties, interest, discounts, offsets, tax relief, credits, special assessments, fees and advance payments on bills.
- 5.17 Print real, personal and centrally assessed property tax bills separately.
- 5.18* How does the system distribute taxes collected?

*Requires only narrative response.

5.19 Detail delinquent taxes on bill forms.

5.20 Generate single bill itemizing multiple levy codes.

5.21 Show and post to accounts receivable payments six (6) years into the future.

Process Miscellaneous Receivables (fees not distributed to taxing authorities):

5.22 Track and include itemization on tax bills for miscellaneous receivables, such as:

- o Warrant fees
- o NSF check charges
- o 5% foreclosure ad cost

5.23 Provide update of special receivable to an account and itemize them on bills.

5.24 Update appropriate general and agency funds after addition of special receivables.

5.25 Generate invoices for lenders for postage and requested statements.

Correct Bills:

MANDATORY:

5.26 Produce supplemental bills resulting from a supplemental levy.

DESIRABLE:

5.27 Allow override of automatic production of corrected tax bill.

5.28 Automatically produce corrected tax bills for:

- o Divisions and consolidations;
- o Roll changes to values to correct errors;
- o Results of appeals and assessment reviews;
- o Special assessments;
- o Cancellations of exemptions and deferrals.

5.29 Regenerate previously printed tax bills or informational statements on request.

5.30 Calculate or suppress interest or discount using various rates applied over various time periods for different types of receivables (taxes and fees).

Post Payments and Adjustments:

MANDATORY:

- 5.31 Produce bill form that can be optically scanned.
- 5.32 Apply and distribute payments to oldest (most delinquent) year first.

DESIRABLE:

- 5.33 Allow payments to be manually entered online.
- 5.34* Describe whether and how terminals function as point of sale cash registers.
- 5.35 Place payment posting errors in suspense file and produce report for manual follow-up without passing through data entry a second time.
- 5.36 Reverse any payment (such as posting to wrong account or NSF check) on command and recalculate subsequent tax, interest, and payments.

*Requires only narrative response.

5.37 Report and post as paid in full overpayments and underpayments less or greater than a specified amount.

5.38 Generate a refund and post as paid in full overpayments greater than or equal to a specified amount.

5.39 Generate underpayment notice to prevent loss of discount.

5.40* Explain how the system handles underpayments.

Refund Overpayments:

MANDATORY:

5.41 Break refund amount into principle and interest on check.

5.42 Track 1099 information, such as Social Security Number and Employer ID Number.

DESIRABLE:

5.43 Provide for on-line approval of refunds.

*Requires only narrative response.

5.44 Issue pro rata refunds to multiple payees at different addresses when they own property jointly.

5.45 Aggregate multiple refunds to a single payee on one check.

5.46 Create check register for overpayment refunds.

Collect Taxes:

5.47 Generate tax warrant for collection of delinquent personal property tax; assign certified mail numbers.

5.48 Flag accounts in which personal property tax delinquencies may give rise to liens against real property under the same ownership.

5.49 Transfer personal property to real property accounts and identify liens.

5.50 Produce list of delinquencies on magnetic media.

5.51 Calculate and accumulate penalties and interest on delinquencies.

5.52 Produce notice before distraint, detailing personal property tax, penalty and interest amounts.

- 5.53 Record agreements on unusual payment schedules; monitor and report on payment performance against agreement terms.
- 5.54 Record satisfaction of delinquencies.
- 5.55 Maintain textual history of collection contacts.
- 5.56 Provide a means to designate write off uncollectible personal property receivables.

Foreclosure for Delinquent Taxes:

MANDATORY:

- 5.57 Create list in hard copy or other media of delinquent real property taxes for distribution to courts, newspapers, County counsel, and the public.
- 5.58 Print foreclosure notices addressed to owner or authorized agent; assign certified mail numbers; notify any other interested party who has requested notification.
- 5.59 Calculate and add to receivables the cost of publication, foreclosure redemption fee and title fee.

5.60 Generate notification of expiration of redemption period;
assign certified mail number; issue notices to all parties with
a legally protected interest.

DESIRABLE:

5.61 Generate tax statement showing interest and other fees to a
specific date.

5.62 Report property not redeemed within the allowed period.

5.63 Write off receivable after property has been deeded to the
County.

Monitor Receivables:

5.64 Report receivable balances by fund, accounting year, accounting
month, tax year, and taxing district.

5.68 Produce the following reports:

MANDATORY:

o Roll balance by tax year and monthly balance comparison.

o Monthly summary by transaction code.

- o Advance collection report.
- o Batch suspense amount report.
- o Suspense account collection report.
- o Cancelled deferrals report by levy code, percentage and amount, by type of property.
- o Accounts in foreclosure.
- o 1099 report.
- o Number of statements requested by mortgage companies (for billing purposes).
- o Daily deposit report.
- o Uncollectible personal property accounts by year.

DESIRABLE:

- o Receivables aging report.
- o Payment agreement report.

- o Accounts by status.

- o Personal property above a specified amount.

C. ADDITIONAL APPLICATIONS

1. Personal Property Valuation and Maintenance

In addition to the requirements listed below, refer to pages 8 and 11 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

1.1 Change personal property account number when related real property account number changes.

1.2 Record receipt of personal property; track filing status, via 2-digit codes.

1.3 Maintain residential characteristics for houseboats and mobile homes.

1.4 Preserve confidentiality of personal property filings.

1.5 Receive personal property filings on magnetic tape or other electronic media from banks and other large accounts.

- 1.6 Produce reports by age or life of equipment.
- 1.7 Allow re-calculation of value based on changes, additions, or deletions filed by taxpayer.
- 1.8 Enter and update the following information:
 - Asset acquisition cost
 - Year of purchase
 - Useful life code/category from table
 - Asset location
- 1.9 Provide field for comments--work file (not public record).
- 1.10 Move account data from one account to another when taxpayer relocates. How does the system record relocation and assign correct levy codes?
- 1.11 Cross reference common ownership so that a change to one location record is replicated in other appropriate records.
- 1.12 Calculate assessed value based on a complete list of equipment.

1.13* Please provide an explanation of personal property account numbering scheme that defines the meaning of the number and how individual property items are interrelated. Is the number determined externally or generated internally?

1.14 Cross-reference personal property accounts to real property accounts.

2. Property Actions (for real, personal and centrally assessed property)

In addition to the requirements listed below, refer to pages 4-7 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

MANDATORY:

2.1 Maintain a cross-reference between old account and new account numbers.

DESIRABLE:

2.2 Track filing status and application received date for exemptions and deferrals by code.

*Requires only narrative response.

- 2.3 Generate, upon withdrawal, tax statement detailing deferred tax amounts and interest by year.
- 2.4 Flag exemptions and deferrals for review when taxpayer name (not taxpayer agent name) changes.
- 2.5 Provide for manually calculated tax and payment in lieu of tax amounts.
- 2.6 Apply exemption(s) to one or several individuals when property is jointly occupied.
- 2.7 Capture frozen appraisal value of historic properties and open space exemptions, and calculate exemption (the difference between the appraised value and frozen value).
- 2.8 Adjust taxes to a specified date when an exemption is added or removed.
- 2.9 Flag and report pending levy district boundary changes and annexation numbers.
- 2.10 Use levy code to define the geographical area with a unique set of levies (statutory levies, voter approved levies, multi-year authorization, etc.) for all districts in the area.

- 2.11 Allow the set of properties that pay a district's bond levy to differ from the properties currently within that district's boundaries.
- 2.12 Allow the area of one type of district to overlap multiple districts of other types (i.e., same hospital district overlaps several fire districts).
- 2.13 Associate parcels in changed districts to correct districts and levies.
- 2.14 Compare and report changes in exemption status overtime.
- 2.15 Attach improvements to the correct parcel upon division or change in boundary.
- 2.16 Balance total value and taxes of old accounts to total value and taxes of new accounts after division or consolidation.
- 2.17 Interface with other systems such as commercial/industrial for account changes.
- 2.18 Provide for legal tax roll, metes and bounds descriptions of variable length. How does the system maintain change and access those descriptions?

2.19 Specify value distribution among multiple owners for automatic tax calculation upon re-evaluation related to division or appeal.

2.20 Prop actions track account number history and apportion value in property divisions or consolidations. How does the system allocate and calculate tax for divisions and consolidations?

2.21 List exemption by legal description.

2.22 Report leased property and expiration of lease.

3. Document Indexing and Maintenance (for real, personal and centrally assessed property)

In addition to the requirements listed below, refer to page 3 of Appendix A for processing requirements and to Appendix B for definitions of functions and processes.

Records Indexing and Maintenance:

3.1 Record a new instrument and maintain it on-line or in batch mode.

3.2 Update/correct an instrument number, grantor or grantee, etc.

- 3.3 Inquire by name or instrument number, etc.
- 3.4 Produce reception record--yearly index listing by instrument type in report format.
- 3.5 Report instrument numbers missing from sequence.
- 3.6 Generate monthly bills to State agencies for document recording.
- 3.7 Update assessment roll names, addresses and transactions for specified documents, such as deeds and contracts.
- 3.8 Produce yearly report of instruments recorded.
- 3.9 Allow for batching dissimilar documents, such as ownership changes with sales changes.
- 3.10 Maintain history of property ownership.
- 3.12 Maintain history of property sold on contract.
- 3.13 Match legal description to account number and roll file; update roll and sales file.
- 3.14 Maintain (via batch update) unlimited years data.

3.15 Create yearly archival index.

3.16 Provide mass update capability (i.e., street name).

4. Appeal Processing (for real, personal and centrally assessed property)

In addition to the requirements listed below, refer to page 17 of Appendix A for processing requirements, and to Appendix B for definitions of functions and processes.

4.1 Track appeal status and generate status reports.

4.2 Track appeal results and adjust roll values accordingly.

4.3 Provide update capability for:

- Appeal number
- Tax year
- Requested value
- Appraiser name and identification number
- Appeal body (i.e., BOE, DOR, etc.)

4.4 Correct record for any year.

4.5 Produce and update hearing date, time and location (DOR, Small Claims, Tax Court).

- 4.6 Track multiple filings for appeals on the same property or by the same party.
- 4.7 Provide for entry of various agency appeals for multiple tax years on real, personal or utility property.
- 4.8 Capture stipulation data and generate letter to taxpayer.
- 4.9 Report outstanding appeals.
- 4.10 Track appeals by reason for or type of appeal.
- 4.11 Cross-reference appeals to personal property, commercial, and residential records.
- 4.12 Generate notices of receipt, decision and hearing date.
- 4.13 Report annual summary of changes to roll resulting from appeals.
- 4.14 Report appeals exceeding 1/4 of 1% (or other portion) of tax roll.
- 4.15 Interface appeal data to tax collection on an account.

VII. TECHNICAL REQUIREMENTS

A. MANDATORY SPECIFICATIONS

The County will consider only those systems whose central components run on an IBM mainframe platform under MVS XA, CICS release 1.7, and SNA communications architecture using ADABAS, DB2 or VSAM file structure.

B. GENERAL SUPPORT

- 1.* Describe the installation and user support available as part of the purchase price of the package.
2. What is the typical maintenance staffing requirement for your application software?
3. What is the average number of software releases annually?
4. What hot line support is available for the package and what are the hours and time zone of service?
5. Do you provide a test database for initial testing and acceptance?
- 7.* Describe the maintenance support available for the software.

*Requires only narrative response.

8. Describe the warranty for the software.
9. Provide a copy of the software maintenance contract.
10. Provide a one page schematic of the software system showing module interaction.

C. HARDWARE/SOFTWARE

1. List the product modules required to support Assessment and Taxation business functions.
2. Does the system provide for both on-line and batch processing? Specify what portion of the system are on-line and what are batch.
3. Where on-line processing is available, is it a real-time update (as opposed to a shadow file queue for nightly batch updates)?
4. What file access/data base manager(s) is used by the software package?
5. Describe the system backup procedures, including frequency, mode, methods, etc.
6. Describe data presentation over time: detail for current data, summary for older data, etc.

7. Describe support for upload/download of data for handheld or laptop devices.
8. Can database updates be made without passing system edits?: Are on-line edits emulated or connected in batch mode?
9. What is the typical processing window for batch jobs?
10. Include sample I/O documents; screens, reports, graphical print if available.
11. Describe any specific hardware requirements for printing. Is remote print spooling supported?
12. What graphics output devices are required to support graphical printing?
13. Does the application run in color? If so, can it be modified to run in monochrome?
14. What type of terminals are supported?
15. How many lines appear on each screen?
16. Are windowing capabilities provided?

17. How does the package support remittance processing in a cash register environment? Is an automated tax collection/cashiering function included, and does it require special hardware?
18. Are distributed components available? Is so, describe the nature and operating environment of any decentralized component(s).
19. Does the system provide for centrally generated broadcast messages? User generated broadcast messages? Internal application generated messages?
20. Are consistency edits between fields provided?

D. UTILITY

1. Do you provide software which will purge data files? If so, can the parameters be user-specified?
2. Is a data extraction facility provided for download to PCs? Can the output file be designated as ASCII?
3. Describe data import capabilities.
4. Describe function of any utility modules available.
5. Are conversion aids available for initial conversion?

E. ON-LINE HELP

1. Describe the type of on-line help screens provided; screen, field level?
2. Are on-line tutorials or learning aids provided?

F. AUDIT TRAIL

1. Does the package provide before and after images of changed data outside of CICS including operator ID, time and date stamp?
2. Does the package provide an on-line log screen and inquiries to review changes?
3. Describe any audit trail recording/retrieval available for changes to system data.

G. ACCESS/SECURITY

1. Describe the security structure of the product. Are there application, user, terminal, field, and or action level security?
2. Provide sample screens for security maintenance.
3. Can user profiles be set up and copied for families of like functions and/or tasks?

4. Describe how the simultaneous update of a record is prevented.
5. Can terminal profiles be set up?

H. PROGRAMMING LANGUAGES/SOURCE CODE

1. What language(s) and version number is the package written in? Is it a standard ANSI programming language?
2. Do you provide source code?
3. Include a sample of your source code which illustrates database calls and structured program design.

I. TABLE DRIVEN PARAMETERS

1. Does your system include any hard-coded parameters? For table driven parameters, are on-line update of these tables available? Are editing features in place? Are the screen user-friendly with on-line help available? Include sample copies of these update screens.

J. REPORTING

1. Does the package include a report generator? If not, what report generator will work with your product?

2. If a report generator is included, provide a copy of the user manual and a description of the system resources it requires.

K. DOCUMENTATION

1. Provide a sample of each type of application documentation that is available for your system.
2. Provide a copy of your user procedure manual and user training documentation.

APPENDIX A

FUNCTIONAL DECOMPOSITION DIAGRAMS

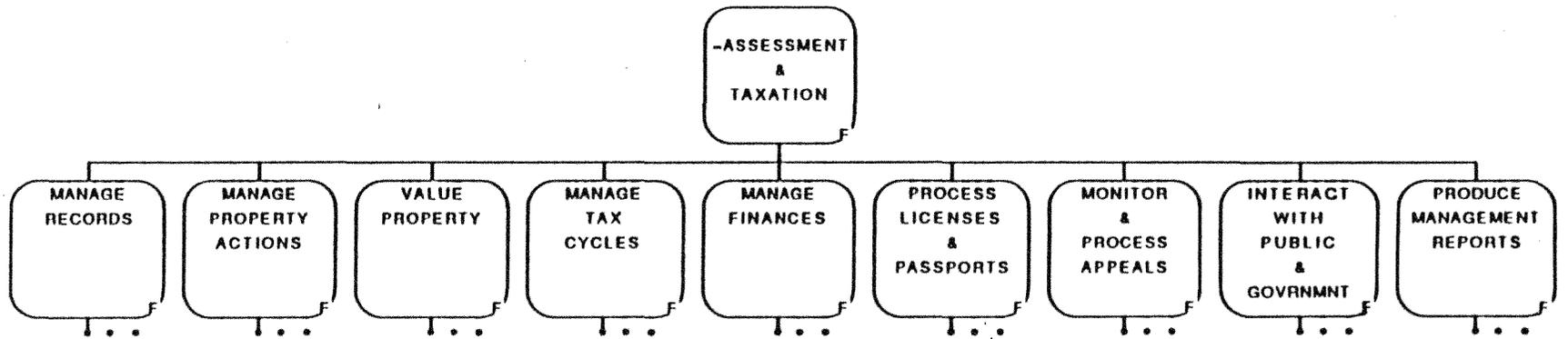
APPENDIX A FUNCTIONAL DECOMPOSITION

The Function Decomposition diagram represents a hierarchical structure of the required business functions and processes to support the Assessment and Taxation Division. Each of the functions and processes identified are performed by one or more sections or program units within the Division.

The functions, depicted with a "F" in the lower right corner of the rectangle, identifies a high level ongoing activity that must take place to perpetuate the business. Each of these functions are further broken down into the lower level business functions or processes.

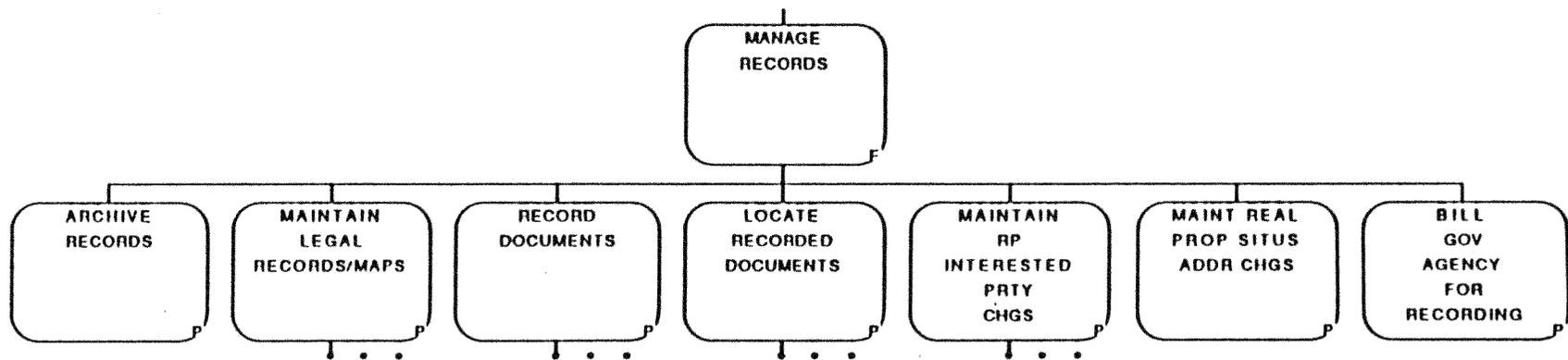
The processes depicted with a "P" in the lower corner of the rectangle, are ongoing sets of related activities that support one function. Processes are repeatedly executed and have a definable start and stop. These processes may be further broken down into other processes.

Meanings of the functions and processes are defined in Appendix B.



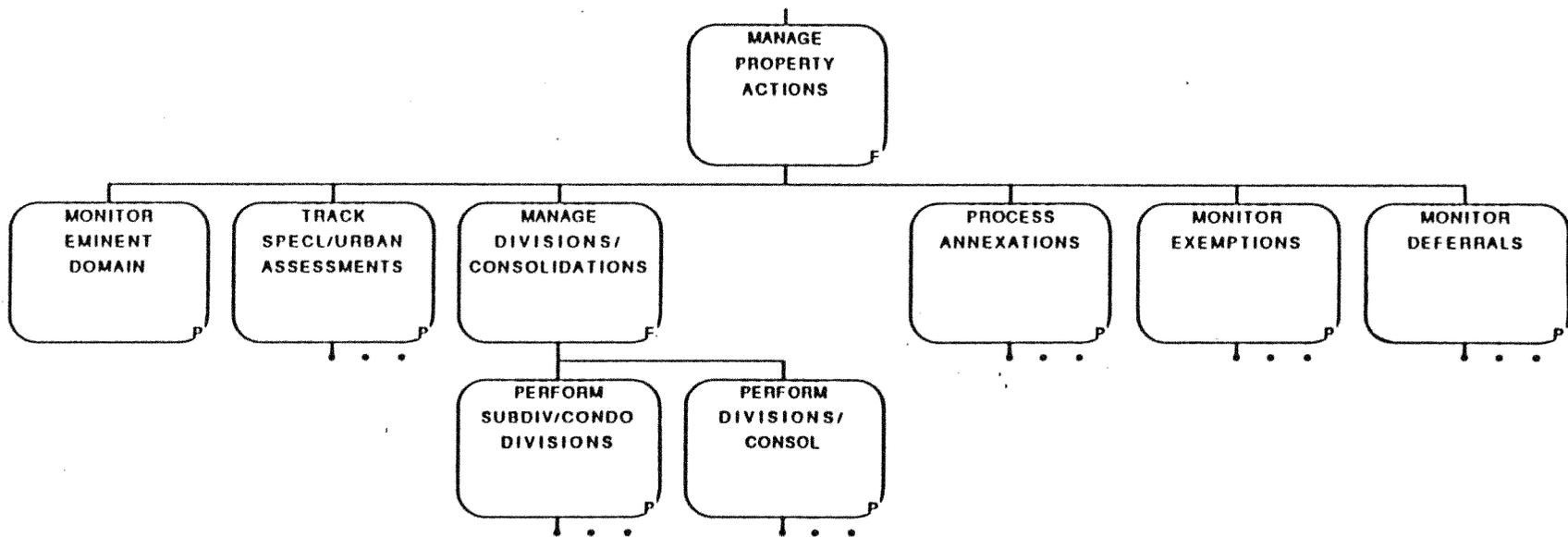
-2-

-ASSESSMENT & TAXATION

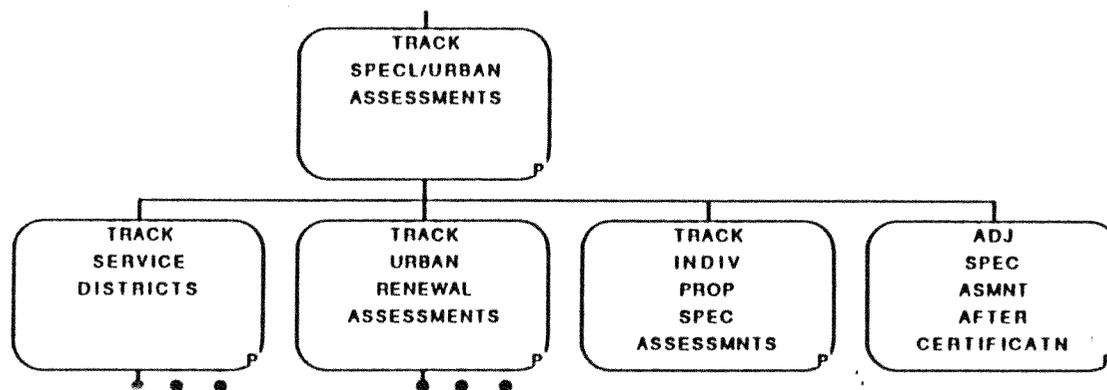


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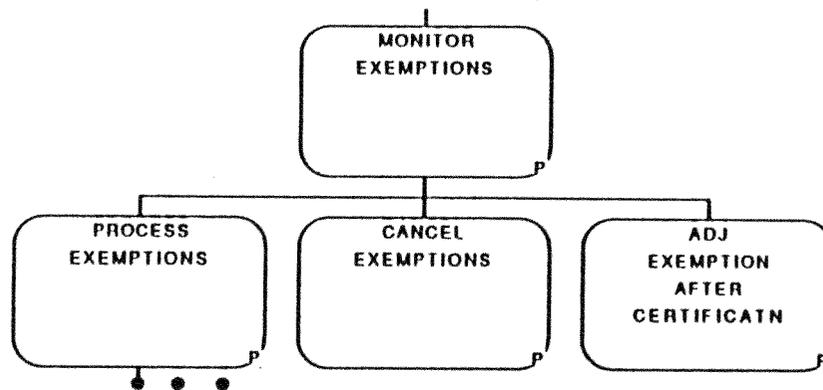
MANAGE RECORDS



MANAGE PROPERTY ACTIONS

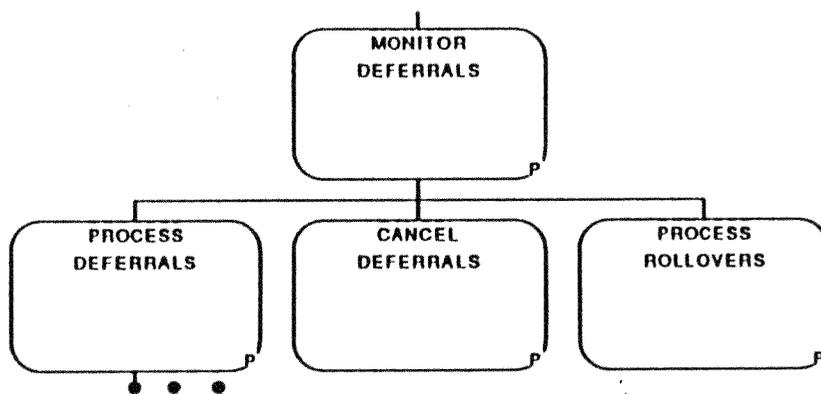


TRACK SPEC/URBAN ASSESSMENTS

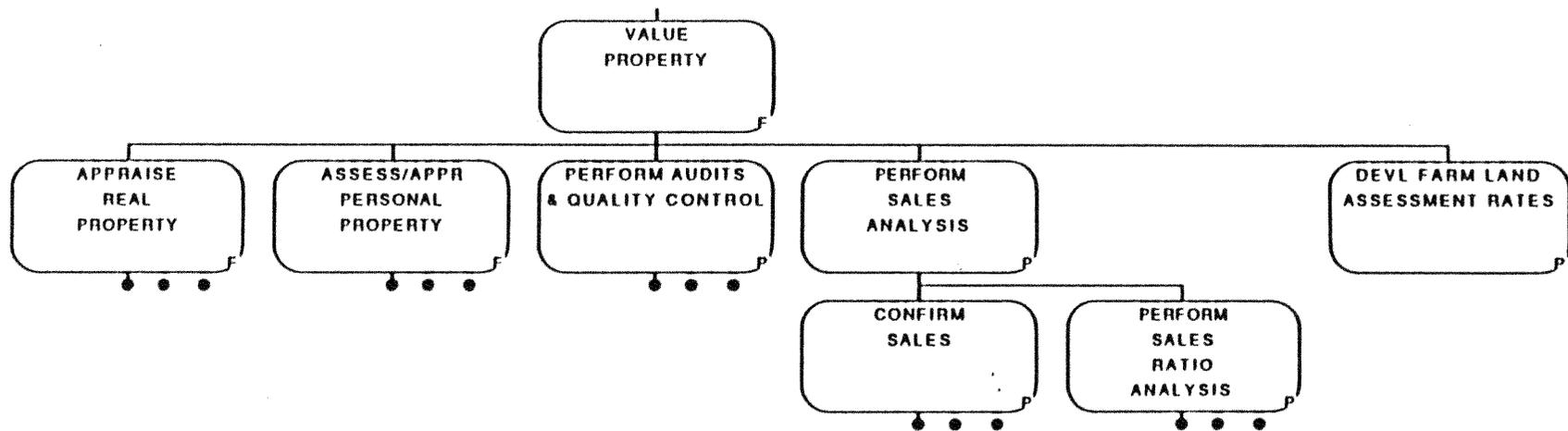


-9-

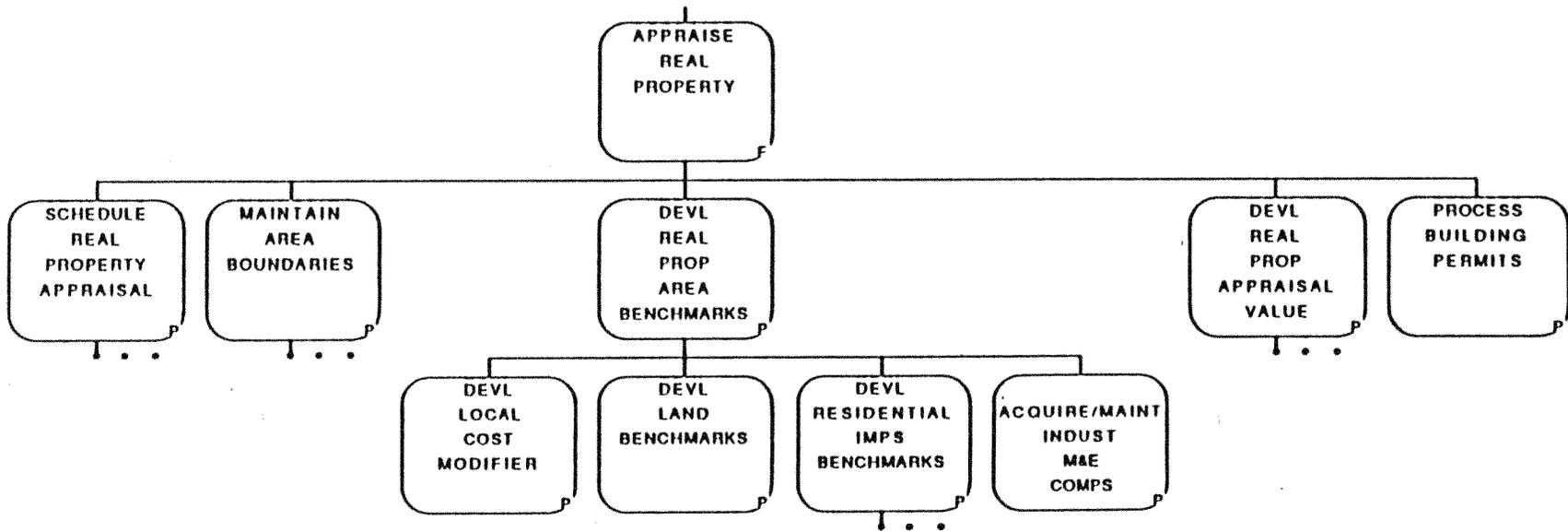
MONITOR EXEMPTIONS



MONITOR DEFERRALS

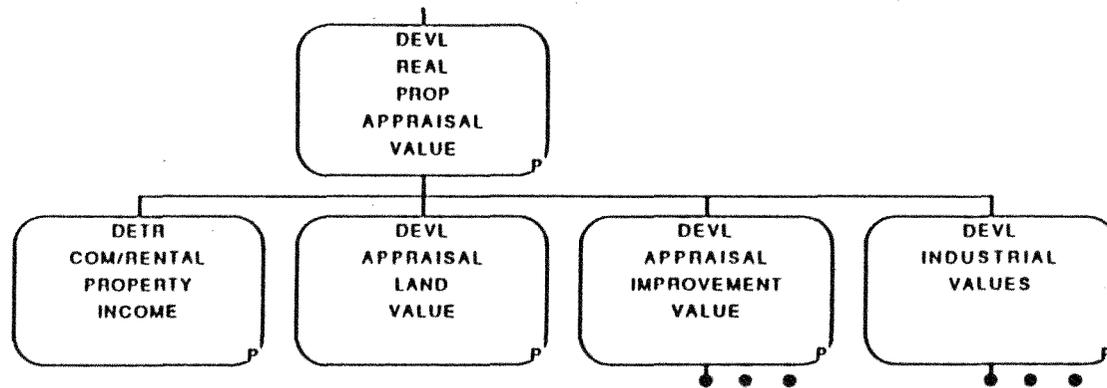


VALUE PROPERTY

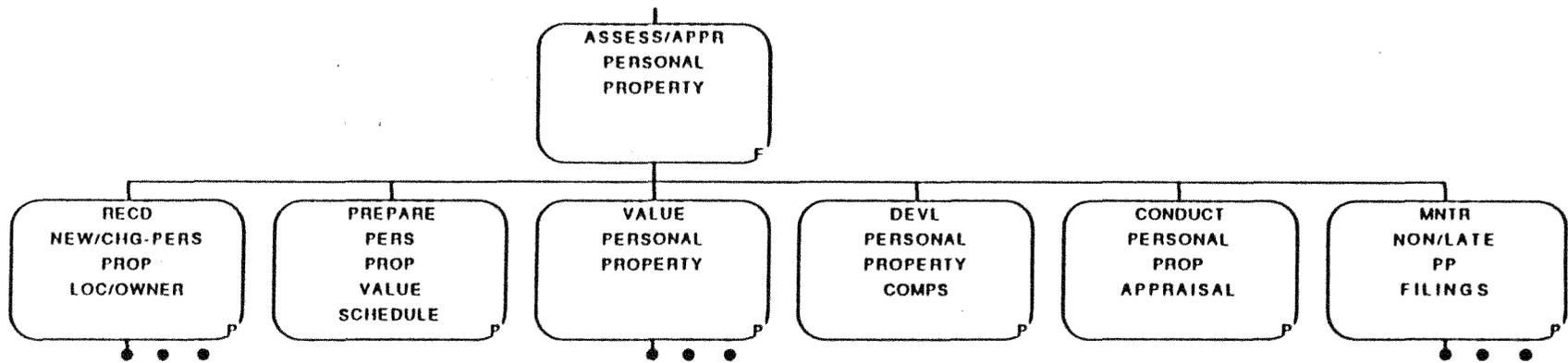


-9-

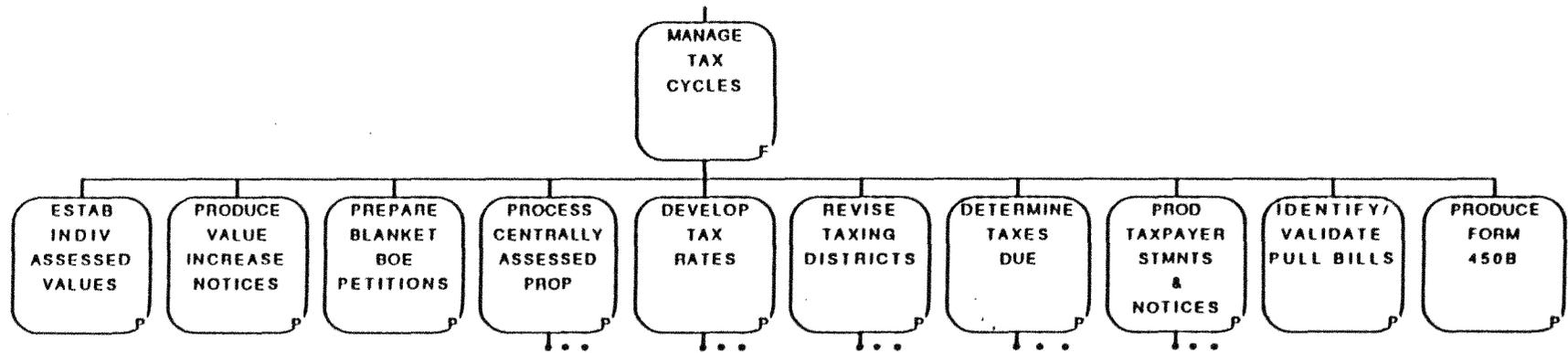
APPRAISE REAL PROPERTY



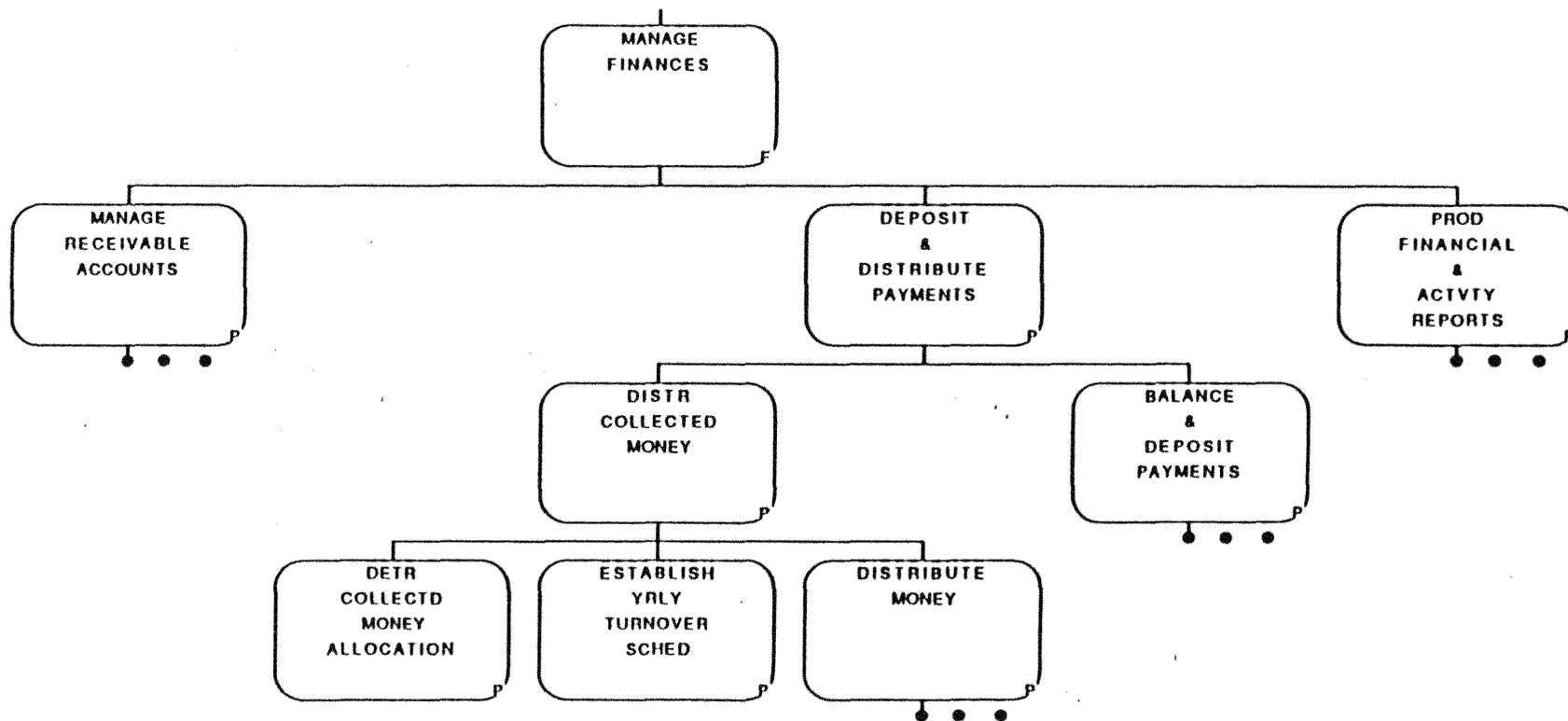
DEVL REAL PROP APPRAISAL VALUE



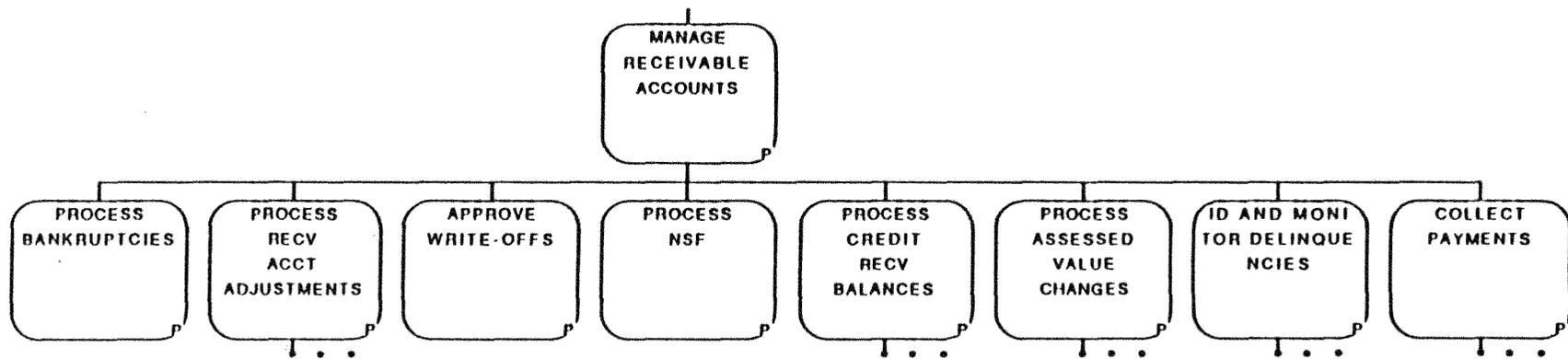
ASSESS/APPR PERSONAL PROPERTY



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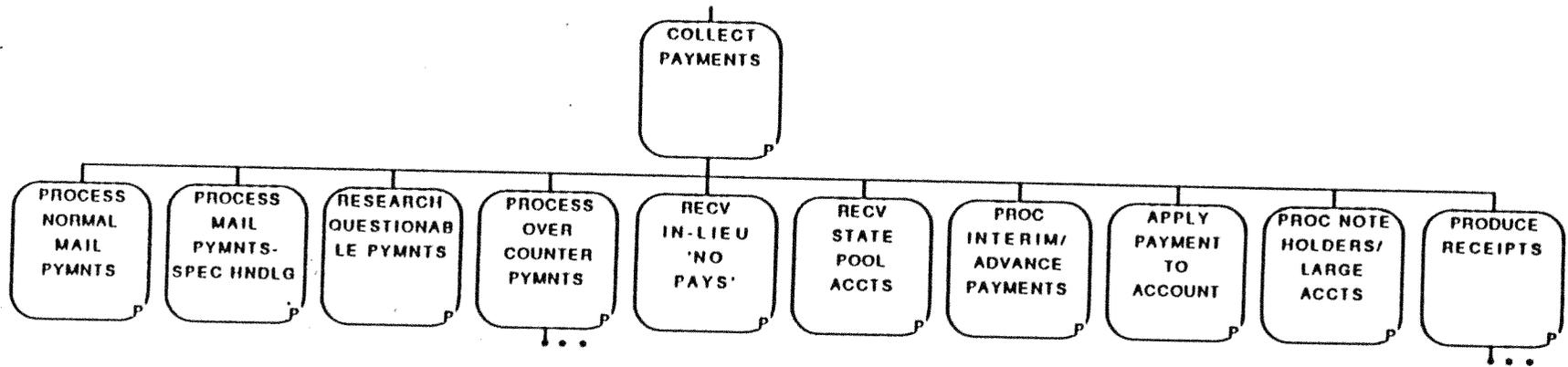


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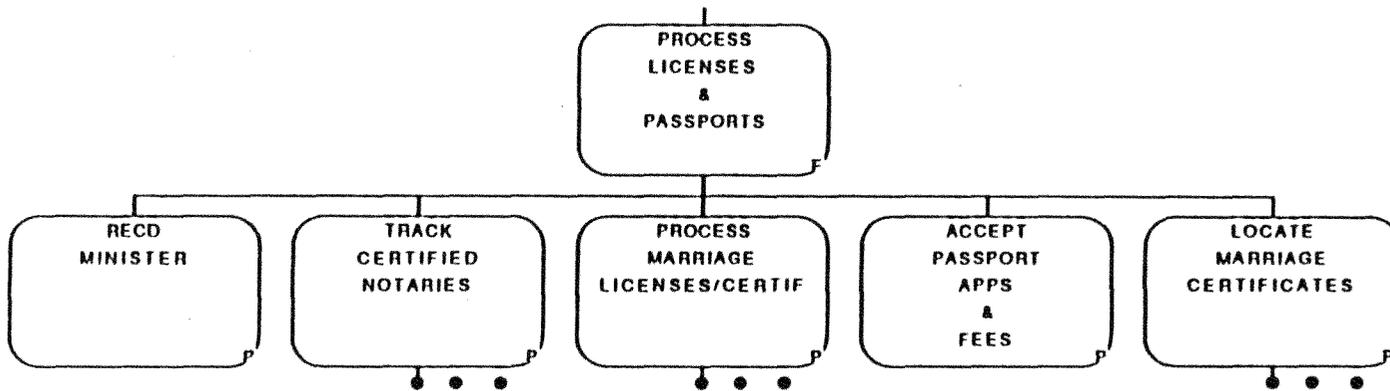


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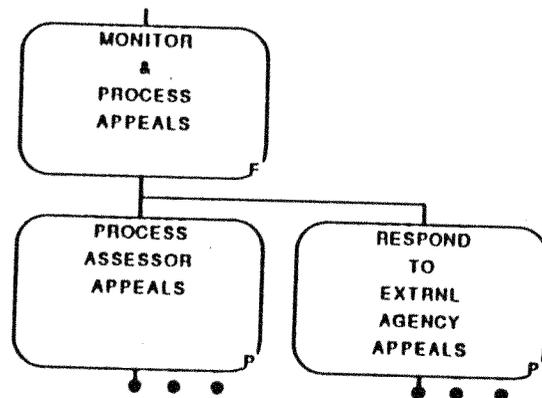
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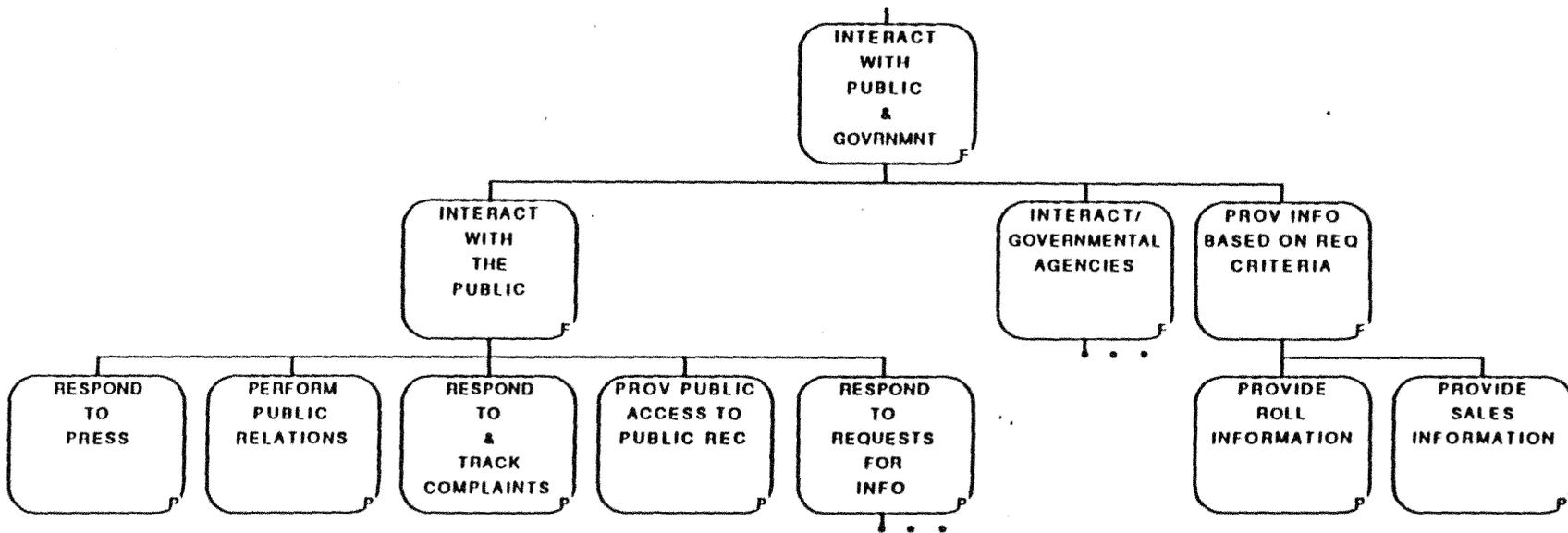
COLLECT PAYMENTS



PROCESS LICENSES & PASSPORTS

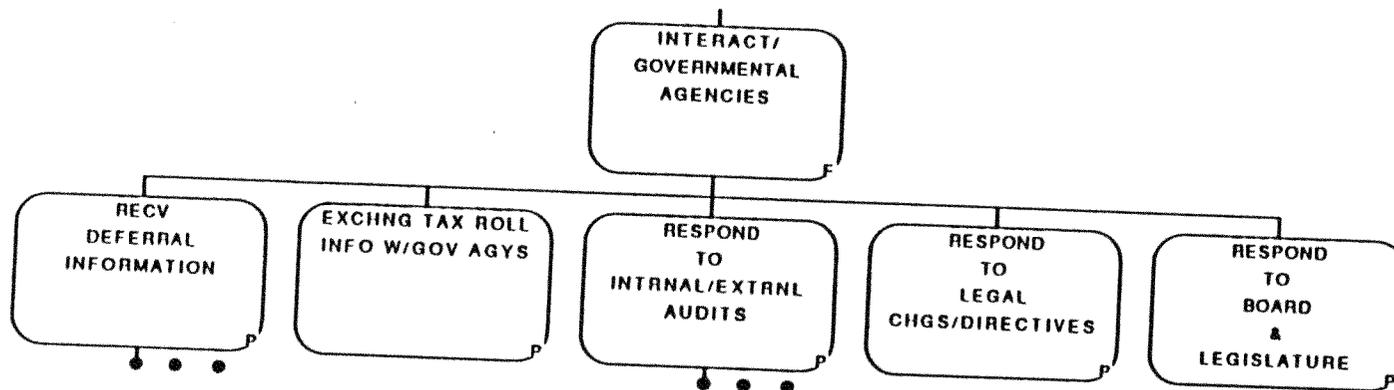


MONITOR & PROCESS APPEALS

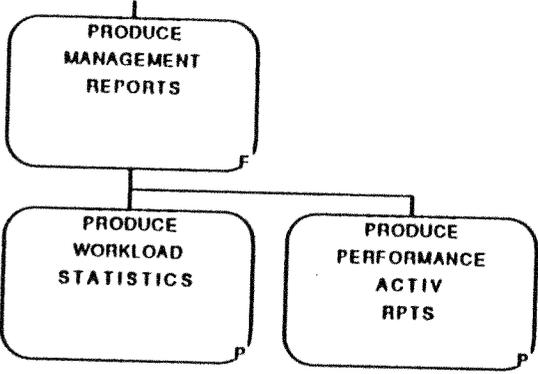


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INTERACT WITH PUBLIC & GOVERNMENT



INTERACT/GOVERNMENTAL AGENCIES



PRODUCE MANAGEMENT REPORTS

APPENDIX B

FUNCTIONS AND PROCESS DEFINITIONS

APPENDIX B

FUNCTIONS AND PROCESS DEFINITIONS

The functions and processes which represent the activities performed by the Assessment and Taxation Division have been defined below. These definitions were supplied and refined by Assessment and Taxation personnel involved in rapid analysis sessions and reviews.

ACCEPT PASSPORT APPS & FEES

This process includes accepting the passport fees and auditing the passport applications before transmitting them to Seattle.

ACQUIRE/MAINT INDUST M&E COMPS

This is the process of acquiring and maintaining industrial machinery and equipment comparables. Comparables may be replacement cost values, income analysis, or direct sales.

ADJ EXEMPTION AFTER CERTIFICATN

This is the process of adjusting the exemption values after the roll has been certified. These adjustments may change the taxes owed.

ADJ SPEC ASMNT AFTER CERTIFICATN

This is the process of adjusting special assessment values after certification of the roll. These adjustments may change the taxes owed.

APPLY PAYMENT TO ACCOUNT

This process is the actual applying of individual payments to the financial account regardless of where the payment entered the system.

APPRAISE REAL PROPERTY

This function includes the following processes: Scheduling Real Property Appraisals; Maintaining Area Boundaries; Developing the Real Property Area Benchmarks; and, Developing the Real Property Appraisal Value.

APPROVE WRITE-OFFS

This process includes obtaining approval to write off uncollectible Personal Property tax.

ARCHIVE RECORDS

This process includes archiving all historical records both hard copy and automated.

ASSESS/APPR PERSONAL PROPERTY

This function includes the following processes: Recording New/Changes for Personal Property Location/Owner; Preparing the Personal Property Value Schedule; Valuing Personal Property; Developing the Personal Property Comparables; Conducting Personal Property Appraisals; and, Monitoring Non/Late Personal Property Filings.

BALANCE & DEPOSIT PAYMENTS

This process includes balancing and reconciling over the counter payments, reconciling the micr tape, making out the deposit and accounting slips, depositing the money in the bank, balancing the processed batches and balancing the deposits to the bank statement and general ledger.

BILL GOV AGENCY FOR RECORDING

This process includes billing approved agencies on a monthly basis for recording fees which have been incurred during the billing period.

CANCEL DEFERRALS

This process includes cancelling all types of deferrals which may cause additional taxes to be owed.

CANCEL EXEMPTIONS

This process includes cancelling all types of exemptions which may cause additional taxes to be owed.

COLLECT PAYMENTS

This process includes: processing the normal mail payments which have a check for one piece of property and the top portion of the bill; processing of special handling payments which may include payments without the top portion of the bill, no check, etc.; researching questionable payments; processing "over the counter payments" and receivable accounts from the state pool; processing interim and advance payments; applying the payments to the accounts; processing large numbers of accounts payments from note holder and producing receipts for the DOR and DVA.

CONDUCT PERSONAL PROP APPRAISAL

The process includes: scheduling and conducting an on-site inspection of personal property; recording the facts and condition of the property; and, determining and assigning the property appraised value.

CONFIRM SALES

This process includes verifying the type of sale in order to determine if it should be included in the sales analysis and to correct the sales information as required. The verification can be done by sending a sale confirmation letter to the buyer, or conducting an on-site confirmation, or by confirming the sale by telephone.

DEPOSIT & DISTRIBUTE PAYMENTS

This is the process of balancing payments for deposit, depositing the money in the bank and distributing the collected payments.

DETERMINE TAXES DUE

This process includes determining the taxable value for an individual piece of property, determining the tax due totaled by tax district and the total due by levy code; extending the ad valorem and special assessment taxes to individual financial accounts; and, balancing and certifying the taxes.

DETR COLLECTD MONEY ALLOCATION

This process of determines the percent of allocation each taxing district, service district and urban renewal district will receive from taxes collected for that tax year.

DETR COM/RENTAL PROPERTY INCOME

The process includes the gathering of income information on commercial and rental properties from property owners, brokers, and fee appraisers.

DEVELOP TAX RATES

This process includes; receiving the taxing district budgets; determining the tax amount to collect for each district; calculating the assessed value within each taxing district; removing offsets to the roll; determining the urban renewal excess; sending and receiving values and offsets from other counties; balancing the tax rate for joint districts; and, determining the tax rates by tax district and consolidated rates by levy code area.

DEVL APPRAISAL IMPROVEMENT VALUE

The process includes sending and receiving the re-appraisal questionnaire notice to obtain income and sales information and developing or updating the appraisal improvement value.

DEVL APPRAISAL LAND VALUE

The process includes inspecting the property if necessary; recording any changes to land characteristics and enhancements; identifying the appropriate land benchmark to use; and, assigning the property land appraisal value.

DEVL FARM LAND ASSESSMENT RATES

This is the process of developing the farm land assessment rates.

DEVL INDUSTRIAL VALUES

This process includes sending and receiving of the Election Notice which allows the taxpayer to determine which appraisal method will be used; receiving state conducted industrial appraisals; and, processing the Real Property Return (RPR). Processing the RPR includes: sending and receiving the RPR, receiving and granting/denying RPR

filing extensions; monitoring the non/late RPRs; and, receiving the state trending values that assist in developing and revising the Real Property Valuation Computation Sheet.

DEVL LAND BENCHMARKS

This process includes; finding sales within the past year; field inspections of the sales; categorization of individual sales and making adjustments for view and paved streets.

DEVL LOCAL COST MODIFIER

This is the process of developing the current local cost modifier for each neighborhood by using last years local cost modifier and obtaining comparisons from the state.

DEVL PERSONAL PROPERTY COMPS

This process includes gathering and maintaining sales information on new and used personal property.

DEVL REAL PROP APPRAISAL VALUE

This process includes: determining the commercial and real property income, developing the land values; developing the appraisal improvement values including sending and receiving a reappraisal questionnaire and developing appraisal values on improvements; developing industrial values including sending and receiving the election notice; receiving the state conducted industrial appraisals; and, processing the real property return.

DEVL REAL PROP AREA BENCHMARKS

The process includes: developing the local cost modifier and land benchmarks; acquiring and maintaining industrial equipment and machinery comparables; and, developing the improvement benchmarks which involves developing the improvements depreciation schedule and determining the income, replacement, and market values.

DEVL RESIDENTIAL IMPS BENCHMARKS

This is the process of developing improvement benchmarks for residential and specific personal property (floating/mobile). It includes developing the improvement depreciation schedule, determining the income value of rental property, determining the improvement market value, and, determining the replacement value of improvements.

DISTR COLLECTED MONEY

This process includes: determining the allocation of collected money to each taxing body; establishing the yearly turnover schedule for distribution; distributing the money to the taxing bodies; distributing marriage license fees to the state; distributing other fees and internal funds such as passport fees and general fund monies; and, notifying finance of the in-lieu exemptions for distribution.

DISTRIBUTE MONEY

This process includes distributing the money to the taxing bodies, distributing marriage license fees to the state, distributing other fees internal to the county; and, notifying finance of in-lieu distribution.

ESTAB INDIV ASSESSED VALUES

This process includes establishing the assessed value for property using a trended factor or the appraised value developed for properties that are included in the re-appraisal district.

ESTABLISH YRLY TURNOVER SCHED

This is the process of establishing the yearly tax turnover schedule which identifies the dates and how often tax turnover to the taxing bodies will take place.

EXCHNG TAX ROLL INFO W/GOV AGYS

This is the process of sending and receiving tax roll information to/from all other government agencies including the State of Oregon, other counties, and, the cities such as Portland, Gresham, and Troutdale.

ID AND MONITOR DELINQUENCIES

This process includes processing delinquent personal property, real property, centrally assessed property and notifying TTS/RTS of the delinquencies.

IDENTIFY/VALIDATE PULL BILLS

This process includes: sending a validation tape to DOR, DVA, TTS, AND RTS to identify their accounts; identifying duplicate account requests; identifying accounts for note holders and title companies; and, identifying special handling that requires the bills to be pulled for non-mailings.

INTERACT WITH PUBLIC & GOVRNMNT

This function includes the following processes: Interacting with the Public which includes responding to the press, performing public relations, responding to and tracking complaints, providing public access to public records, and responding to requests for information; Interacting with Governmental Agencies which includes receiving deferral information, exchanging tax roll information with governmental agencies, responding to internal and external audits, responding to legal changes and directives, and responding to the County Board and State Legislature; and, Providing Information Based on Requested Criteria which includes providing Roll and Sales information.

INTERACT WITH THE PUBLIC

This function includes the following processes: Responding to the Press; Performing Public Relations; Responding to and tracking Complaints; Providing Public Access to Public Records; and, Responding to Requests for Information.

INTERACT/GOVERNMENTAL AGENCIES

This function includes the following processes: Receiving Deferral Information; Exchanging Tax Roll Information with Governmental Agencies; Responding to Internal/External Audits; Responding to Legal Changes and Directives; and, Responding to the County Board and State Legislature.

LOCATE MARRIAGE CERTIFICATES

This process includes conducting the marriage certificate search, collecting the marriage certificate search fee; and, producing the marriage certificate copies.

LOCATE RECORDED DOCUMENTS

This process includes conducting and producing record searches, producing the recorded copies, and collecting the search/copy fees.

MAINT REAL PROP SITUS ADDR CHGS

This process includes correcting and changing situs addresses related to real property.

MAINTAIN AREA BOUNDARIES

The process includes determining and revising neighborhood and district boundaries, and recording zone changes received from the cities.

MAINTAIN LEGAL RECORDS/MAPS

This process includes: computing the land size for the map change; posting changes to the map; and, distributing the corrected map to Department of Environmental Services, Planning Commission, Residential Appraisal, Elections, and the State Forester.

MAINTAIN RP INTERESTED PRTY CHGS

This process includes correcting and changing interested party roles, names, and address related to real property.

MANAGE DIVISIONS/CONSOLIDATIONS

This function includes the following processes: Performing Subdivision/Condo Divisions which includes receiving sub/condo request, calculating and producing the advance tax slip, recording the plat, and dividing the sub/condo property; and, Performing Divisions/Consolidations which includes receiving the request, splitting/combining the properties appraised values, dividing the property descriptions, consolidating the property descriptions, and sending notice of the division/consolidation.

MANAGE FINANCES

This function includes the following processes: Managing receivable accounts which includes the processes of processing bankruptcies, processing receivable account adjustments, approving write-offs, processing NSF's, processing credit receivable

balances, processing assessed value changes identifying and monitoring delinquencies, and collecting payments; Distributing the collected money to include determining the collected money allocation, establishing the yearly turnover schedule, and distributing the money collected; Balancing and depositing the payments received which includes reconciling the micr tape, balancing and reconciling over the counter payments, depositing the payments, balancing deposits to the bank statement and county general ledger system, and balancing the processed batches; and, Producing various Financial and Activity Reports.

MANAGE PROPERTY ACTIONS

This function includes the following processes: Monitoring Eminent Domain; Tracking Special Assessments and Urban Renewals; Performing Subdivision/Condo Property Divisions; Performing Property Divisions and Consolidations; Processing Annexations; Monitoring Exemptions; and, Monitoring Deferrals.

MANAGE RECEIVABLE ACCOUNTS

This process includes: collecting payments; processing assessed value changes; processing receivable account adjustments; processing NSF's; processing credit receivable balances; identifying and monitoring delinquencies; approving write-offs; and, processing bankruptcies.

MANAGE RECORDS

This function includes the following processes: Archiving Records; Maintaining Legal Records and Maps; Recording Documents; Locating Recorded Documents; Maintaining Real Property Interested Party Changes; Maintaining Real Property Situs Address Changes; and, Billing Governmental Agencies for Recording.

MANAGE TAX CYCLES

This function includes the following processes: Establishing individual property assessed values; Processing Centrally Assessed Property; Developing Tax Rates; Revising the Taxing Districts; Determining Taxes Due; Producing Taxpayer Statements and Notices; Identifying and Validating Pull Bills; and, Producing Form 450B.

MNTR NON/LATE PP FILINGS

The process includes sending late filing and penalty notices, following up on late filings, and recording a penalty for the late filings.

MONITOR & PROCESS APPEALS

This function includes the following processes: Processing Assessor Appeals which includes receiving the taxpayer request, logging and assigning the appeal, reviewing and determining the findings, and issuing a decision and notifying the taxpayer; and, Responding to External Agency Appeals which includes receiving the notice of appeal, assigning and conducting an appraisal, preparing a stipulation, attending a hearing, and receiving the Opinion/Order to correct the Roll.

MONITOR DEFERRALS

This process includes the processing of deferrals which allow for a taxpayer to defer taxes. This involves the following deferral types: 1) forest, 2) EFU farm, 3) non-zone farm, 4) senior citizen, 5) open space, 6) Riparian/wost. This process also includes cancelling deferrals and processing rollover deferrals.

MONITOR EMINENT DOMAIN

This is the process of tracking eminent domain for property which is under dispute between a government agency and taxpayer. This type of dispute is due to the government agency trying to obtain the property for public use and the taxpayer refusing to sell.

MONITOR EXEMPTIONS

This process includes processing the following types of exemptions: 1) veterans, 2) in-lieu of taxes, 3) pollution, 4) government, 5) other exemptions including low-income, historical, and residential rehab which may be one time or annual exemptions. Each of these have different forms and legal requirements.

PERFORM AUDITS & QUALITY CONTROL

The process includes: conducting audits on taxpayer records where the values are based on income method or personal property; auditing appraisal values for quality control; and identifying properties with double assessments or assessed values corrections that have been omitted from the roll.

PERFORM DIVISIONS/CONSOL

This process includes: receiving the division/consolidation request; sending divisions/consolidations notices (e.g., denial notice, state forester notice, and drainage district notice), consolidating the property; dividing the property; and, splitting or combining appraised or assessed values.

PERFORM PUBLIC RELATIONS

This process includes responding to public inquiries and requests for Assessment and Taxation information.

PERFORM SALES ANALYSIS

This process includes confirming sales and conducting a sales ratio analysis to produce the sales ratio study for the Department of Revenue and the trending factors to use in establishing the assessed values for properties that are not in the current reappraisal district.

PERFORM SALES RATIO ANALYSIS

This process includes: calculating and reporting the trend factors to be used in assessing property that is not in the current reappraisal district; receiving certification changes from BOE OR DOR; and, producing the final trend factors.

PERFORM SUBDIV/CONDO DIVISIONS

This process includes: receiving the subdivision or condo request; dividing the subdivision or condo property; recording the plat; and, calculating and producing the advance tax slip.

PREPARE BLANKET BOE PETITIONS

This process includes identifying and preparing a Board of Equalization Petition of real and personal property requiring an assessed value correction. Corrections to assessed values not made prior to May 1 must be reviewed and decided by the Board of Equalization.

PREPARE PERS PROP VALUE SCHEDULE

The process includes reviewing the personal property comparable sales, catalogs from dealers, and the depreciation and valuation schedules received from the DOR to develop and revise personal property valuation schedule, as required.

PROC INTERIM/ADVANCE PAYMENTS

This is the process of monitoring and applying interim or advance tax payments to financial accounts.

PROC NOTE HOLDERS/LARGE ACCTS

This process includes processing large volume payments received from note holders and title companies. This exchange may be via paper, tape, or some other media.

PROCESS ANNEXATIONS

This process includes receiving the annexation order which outlines the area being annexed into the city; identifying the property involved; changing the levy code; and, notifying the appropriate parties of the annexation.

PROCESS ASSESSED VALUE CHANGES

This process includes processing omitted assessed value changes, processing other assessed value changes, and sending the value change notices to the taxpayer.

PROCESS ASSESSOR APPEALS

The process includes: receiving a request from the taxpayer to review the value of one or more properties; logging and assigning the appeal; reviewing the appeal request; documenting the findings of an appraisal; and, issuing and sending a decision to the taxpayer.

PROCESS BANKRUPTCIES

This process includes: researching and discovering bankruptcies; filing a claim with the bankruptcy court; attending creditor meetings; sending and receiving notices to trustees and secured creditors; and, recovering county money.

PROCESS BUILDING PERMITS

This process includes receiving and documenting the building permits received from cities in Multnomah County.

PROCESS CENTRALLY ASSESSED PROP

Centrally assessed property is property that is assessed by DOR (e.g., utilities, airlines, railroads, water transportation, etc.). This process includes: sending and receiving the centrally assessed values from the state; making any resulting changes to the roll; distributing centrally assessed values by levy code; receiving and updating centrally assessed mileage reports; and, receiving and updating yearly mileage.

PROCESS CREDIT RECV BALANCES

This process includes determining the credit balance; notifying the taxpayer of the credit balance; authorizing the refund; notifying finance of the refund; cancelling or stopping payment of refund payments; and, receiving and processing outstanding refund check notifications. The actual issue and signing of the warrant takes place in finance.

PROCESS DEFERRALS

This process includes processing deferrals which allow for taxpayers to defer taxes. This involves the following deferral types: 1) forest 2) EFU farm 3) non-zone farm 4) senior citizen 5) open space 6) Riparian/wost. Each of these have different forms and legal requirements.

PROCESS EXEMPTIONS

This process includes processing the following types of exemptions: 1) veterans 2) in-lieu of taxes 3) industrial equip/machinery pollution 4) government 5) enterprise zone exemptions which are improvements to capital with a declining exempt percentage each year for four years, and 5) other exemptions including low-income, historical, and residential rehab which may be one time or annual exemptions. Each of these exemptions have different forms and legal requirements.

PROCESS LICENSES & PASSPORTS

This function includes the following processes: Recording Ministers; Track Certified Notaries; Processing Marriage Licenses and Certificates; Accepting Passport Applications and Fees; and, Locating Marriage Certificates.

PROCESS MAIL PYMNTS-SPEC HNDLG

This process includes processing payments received in the mail without a check, without the payment stub, without an account number or some other problem which requires special handling.

PROCESS MARRIAGE LICENSES/CERTIF

This process includes issuing the marriage license and certifying the marriage, collecting the marriage license fee, and sending the completed marriage application to vital statistics.

PROCESS NORMAL MAIL PYMNTS

This process includes processing payments received on time and with a check for one or two tax bills and the payment stubs from the bill. Referred to as "blue mail."

PROCESS NSF

This process includes tracking and collecting NSF's, initiating a transaction to reverse the payment, and initiating the NSF charge to the financial account.

PROCESS OVER COUNTER PYMNTS

This process includes accepting over the counter payments in the form of cash, check, or credit card from taxpayers or their legal representative.

PROCESS RECV ACCT ADJUSTMENTS

This process includes the actual application of adjustments to financial accounts, including account handling fees, penalties, correcting adjustments, NSF's , NSF charges, interest and discounts. This process also includes calculating interest and discounts.

PROCESS ROLLOVERS

This process includes the rollover between different types of deferrals, specifically farm, forest and open spaces which may cause taxes to be owed.

PROD FINANCIAL & ACTVTY REPORTS

This process includes preparing the 1099 report yearly, producing revenue reports, producing the collection activity reports, and producing workload statistics.

PROD TAXPAYER STMENTS & NOTICES

This process includes producing and sending the yearly and "thirdly bills," on-demand bills, in-lieu of tax statements and tax notices.

PRODUCE FORM 450B

This process includes creating and sending the 450B report of the breakdown of exempt/deferral property (excluding senior citizen) to the DOR.

PRODUCE MANAGEMENT REPORTS

This function includes the following processes: Producing Workload Statistics; and, Producing Performance Activity Reports.

PRODUCE PERFORMANCE ACTIV RPTS

This process includes reporting on performance activity, such as how long it takes an action to trickle through the system to completion, the speed and response of a transaction, etc.

PRODUCE RECEIPTS

This process includes producing receipts for individuals as well as large volume account holders and title companies. The receipts could be paper, tape, or micro fiche.

PRODUCE VALUE INCREASE NOTICES

This process includes producing and sending the taxpayer a notice of an assessed value increase of five-percent or more for real or personal property.

PRODUCE WORKLOAD STATISTICS

This process includes producing reports on what was done, by who, and how often for all types of activities.

PROV INFO BASED ON REQ CRITERIA

This function includes the following processes: Providing Roll Information; and, Providing Sales Information.

PROV PUBLIC ACCESS TO PUBLIC REC

This process includes providing the public access to public records in an easy to find and easy to use format.

PROVIDE ROLL INFORMATION

This process includes providing roll information about types of property, assessed values, and area square feet, etc.

PROVIDE SALES INFORMATION

This process includes the reporting of property sales based on requested criteria.

RECD MINISTER

This process includes recording the ministers names who are authorized to perform marriages in the State of Oregon.

RECD NEW/CHG-PERS PROP LOC/OWNER

This process includes sending and receiving personal property reports to assist in identifying new property or changes to existing property and recording of location and ownership changes to personal property. Examples of the personal property reports are moorage and mobile home reports, the Marine Board Listing, mobile home reports from the DMV, and sending to and receiving from other Counties information on personal property discovered.

RECORD DOCUMENTS

This process includes recording the document and establishing the interested party and the relationship they have to the property, collecting the recording fee, microfilming the recorded document and returning the recorded document to the person or business.

RECV DEFERRAL INFORMATION

This process includes receiving senior citizen partial payment percentages from the DOR, receiving forest land rates and receiving farm and forest stock requirements.

RECV IN-LIEU 'NO PAYS'

This is the notification from finance that a business had not paid their in-lieu of money which in turn will cause the financial account to be charged the ad valorem tax in the normal tax cycle.

RECV STATE POOL ACCTS

This is the process of receiving tax payments from the DVA and DOR.

RESEARCH QUESTIONABLE PYMNTS

This process includes all the steps required to identify which account to apply a payment to when there is a vital piece of information missing.

RESPOND TO & TRACK COMPLAINTS

This process includes recording, responding to, and tracking complaints received. Examples of complaints include complaints of incorrect billing, conflicting information, customer service, holding on the phone, parking, shuffling of customer, etc.

RESPOND TO BOARD & LEGISLATURE

This process includes responding to inquiries and requests from the Board of Legislature for Assessment and Taxation information.

RESPOND TO EXTRNL AGENCY APPEALS

The process includes: receiving a notice of appeal filed with the BOE, DOR, Small Claims Court, or Tax Court; logging and assigning the appeal; conducting an appraisal as required; preparing a stipulation if necessary; and, receiving the decision to record any adjustments to the Roll.

RESPOND TO INTRNL/EXTRNL AUDITS

This process includes responding to audits performed by the Multnomah County Auditor, as well as external auditing firms contracted by Multnomah County.

RESPOND TO LEGAL CHGS/DIRECTIVES

This process includes responding to mandated changes that affect Assessment and Taxation's business policies and procedures.

RESPOND TO PRESS

This process involves filtering press calls and requests, determining who should respond, providing the press with public information facts, and providing press release information for radio and television.

RESPOND TO REQUESTS FOR INFO

This process includes responding to requests for information on specific financial accounts, information on policies and procedures, providing forms, providing certified copies of public records and providing information on "How to obtain" documents and information.

REVISE TAXING DISTRICTS

This process includes identifying new districts, removing obsolete districts, revising levy code boundaries, and apply taxing districts changes to properties.

SCHEDULE REAL PROPERTY APPRAISAL

The process includes the scheduling of a cycle appraisal as mandated by the State and a non-cycle appraisal due to an appeal, new construction or sale.

TRACK CERTIFIED NOTARIES

This is the process of recording notaries that have been certified.

TRACK INDIV PROP SPEC ASSESSMNTS

This process includes tracking and applying delinquent sewer liens, dunthorpe and bancroft sewer charges.

TRACK SERVICE DISTRICTS

This process includes: receiving new service district assessments such as street lighting, fire patrol, and PUD elections; identifying the service district properties and establishing the service district; and, receiving the service district assessment rates.

TRACK SPECL/URBAN ASSESSMENTS

This process includes: 1) tracking service districts including receiving new service district assessments, identifying the service district properties and establishing the service district, and receiving the service district assessment rates; 2) tracking urban renewal assessments including receiving the urban renewal district boundaries, identifying the properties involved, and establishing the urban renewal property; and, 3) tracking individual property special assessment including tracking and applying delinquent sewer liens.

TRACK URBAN RENEWAL ASSESSMENTS

This process includes: receiving the urban renewal district request and boundaries; identifying the properties involved; establishing the urban renewal property; and, creating or changing levy codes.

VALUE PERSONAL PROPERTY

The process includes developing and sending the personal property return; receiving and granting/denying filing extensions; verifying and reviewing personal property returns; requesting information on incomplete filings; and, determining and recording the personal property value.

VALUE PROPERTY

This function includes the following processes: Appraising Real Property; Assessing and Appraising Personal Property; Performing Audits and Quality Control; Performing Sales Analysis; and, Developing Farm Land Assessment Rates.

APPENDIX C AND D

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APPENDIX E

ENTITY BY SUBJECT AREA

APPENDIX E ENTITY BY SUBJECT AREA

Subject areas are logical groupings of data entities around major subjects of interest to the business. Subject areas represent clusters of data entities that can be reviewed as a unit and serve to simplify understanding of the data architecture.

The entities which have been identified for Assessment and Taxation have been organized into five major categories. These major categories have been further broken down into sub-categories with each sub-category defined with the entities that are closely related for that subject area.

SUBJECT AREA	ENTITY
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px; text-align: center;">Financial</div> <ul style="list-style-type: none"> • Financial Account • Financial General 	Financial Account Financial Acct Transaction NSF Payment Payment Plan Service Fee Bank Memo Batch Deposit Tax Turnover Schedule Taxing Value/Offset
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px; text-align: center;">Recorded Document</div> <ul style="list-style-type: none"> • Recorded Document 	Court Document Marriage Certificate Minister Letter Notary Certification Property Recorded Document Recorded Document

SUBJECT AREA	ENTITY
<div style="border: 1px solid black; padding: 2px; margin-bottom: 10px; display: inline-block;">Property</div> <ul style="list-style-type: none"> <li data-bbox="280 342 602 378">• Personal Property <li data-bbox="280 555 407 591">• Land <li data-bbox="280 768 618 804">• Centrally Assessed <li data-bbox="280 874 691 910">• Improvement Structure <li data-bbox="280 1395 602 1432">• Appraisal Factors <li data-bbox="280 1704 703 1740">• Assessment/Tax Factors 	<ul style="list-style-type: none"> <li data-bbox="894 342 1360 519">Personal Prop Personal Prop Comparable Personal Prop Notice Personal Prop Return Personal Prop Value Schedule <li data-bbox="894 555 1256 732">Farm/Forest Stock Reqr Land Land Enhancement Map Survey <li data-bbox="894 768 1312 838">Centrally Assessed Utility Mileage Distribution <li data-bbox="894 874 1414 1357">Commercial/Industrial Complex Commercial/Industrial Structure Common Facility Condo Complex Condo Unit Floating Structure Improvement Structure Industrial Equip/Machinery Mobile Home Mobile Home Court Moorage Multi-Family Single-Family Situs Address <li data-bbox="894 1395 1409 1668">Appraisal District Improvement Benchmark Improvement Depreciation Sched Land Benchmark Local Cost Modifier Neighborhood Property Income/Rent Zone <li data-bbox="894 1704 1260 1910">Forest Land Rates Service District Sewer/Drainage Tax District Trend Factor Urban Renewal District

SUBJECT AREA	ENTITY
<div data-bbox="272 304 620 346" style="border: 1px solid black; padding: 2px;">Property Actions</div> <ul style="list-style-type: none"> <li data-bbox="272 378 423 412">• Appeal <li data-bbox="272 519 808 553">• Annexation/Deferral/Exemption <li data-bbox="272 689 808 723">• Bankruptcy/Foreclosure/Seizure <li data-bbox="272 902 380 936">• Sale <li data-bbox="272 1008 646 1042">• Property Other Action 	<ul style="list-style-type: none"> <li data-bbox="886 378 1130 480">Appeal Appeal Decision Appeal Hearing <li data-bbox="886 519 1317 655">Annexation Deferral Exemption Exemption/Deferral Request <li data-bbox="886 689 1370 868">Bankruptcy Bankruptcy Action Foreclosure/Redemption Foreclosure/Redemption Action Summary Seizure Action <li data-bbox="886 902 1179 970">Property Sale Sales Confirmation <li data-bbox="886 1008 1256 1076">Certified Roll Correction Property Message
<div data-bbox="272 1151 620 1193" style="border: 1px solid black; padding: 2px;">Interested Party</div> <ul style="list-style-type: none"> <li data-bbox="272 1225 561 1259">• People/Business <li data-bbox="272 1574 764 1608">• Interested Party Notice/Lease <li data-bbox="272 1710 553 1744">• Governing Body 	<ul style="list-style-type: none"> <li data-bbox="886 1225 1268 1540">Business Complaint Employee Interested Party Interested Party Address Interested Party Role Minister Notary Person <li data-bbox="886 1574 1146 1685">Industrial Notice Lease Taxpayer Notice <li data-bbox="886 1710 1000 1779">Agency County

APPENDIX F

ENTITY DEFINITIONS

APPENDIX F ENTITY DEFINITIONS

The entity definitions were developed and refined by Assessment and Taxation personnel involved in rapid analysis sessions and reviews. A sampling of the facts, also known as attributes, follow the definition for each entity.

The entity definitions will prove useful for future development and maintenance projects to ensure successful communication of data entity meanings.

AGENCY

Information about an agency that is receiving a service from A&T or providing service district information. The kinds of information includes the agency name, contact name, phone number, etc.

IS DESCRIBED BY:

AGENCY-NAME
CONTACT-NAME
PHONE-NUMBER

ANNEXATION

Information about the annexation which was received from the Metro Boundary Commission. This includes the annexation number, date received, effective date, etc.

IS DESCRIBED BY:

ANNEXATION-NUMBER
DATE-RECEIVED
EFFECTIVE-DATE

APPEAL

Information on an appeal which a taxpayer or the assessor has requested either to BOE, DOR, State Tax Court, Small Claims, or the Assessor. The kinds of information includes the appeal number, the timeframe of the appeal, the date the appeal was received, reason for the appeal, and the issues.

IS DESCRIBED BY:

APPEAL-NUMBER
DATE-RECEIVED
APPEAL-REASON
APPEAL-ISSUE

APPEAL DECISION

Information on the decision for the appeal which was rendered either by BOE, DOR, State Tax Court, Small Claims, or the Assessor. This includes the decision itself, the date the decision was rendered, and any required value adjustments.

IS DESCRIBED BY:

DECISION-TYPE
DECISION-DATE
ORIGINAL-VALUE
ADJUSTED-VALUE
TAX-YEAR

APPEAL HEARING

Information on the scheduled date, time, type, and location of the appeal hearing.

IS DESCRIBED BY:

HEARING-DATE
HEARING-TIME
HEARING-TYPE
HEARING-LOCATION

APPRAISAL DISTRICT

Information on the appraisal district which assists in identifying all properties subject to reappraisal.

IS DESCRIBED BY:

DISTRICT-CODE
TAX-YEAR

BANK MEMO

Information about a debit/credit memo received from the bank. This includes the type of memo (credit/debit) and the amount of credit/debit.

IS DESCRIBED BY:

MEMO-TYPE
CREDIT-DEBIT-AMOUNT
MEMO-DATE

BANKRUPTCY

Information retained about a bankruptcy case. This includes the case number, trustee name, attorney name, chapter type, who is assigned, date filed, comments, and status.

IS DESCRIBED BY:

CASE-NUMBER
TRUSTEE-NAME

ATTORNEY-NAME
CHAPTER-TYPE
PERSON-ASSIGNED
DATE-FILED
COMMENTS
STATUS

BANKRUPTCY ACTION

Information retained about an action on a bankruptcy case. This includes the type of action, action date, person taking action, action description, contact, and certification number.

IS DESCRIBED BY:

ACTION-TYPE
ACTION-DATE
PERSON-TAKING-ACTION
ACTION-DESCRIPTION
CONTACT
CERTIFICATION-NUMBER

BATCH

Information about a receivable batch for deposit. This includes the batch number, total amount, batch date, beginning and ending receipt numbers.

IS DESCRIBED BY:

BATCH-NUMBER
BATCH-AMOUNT
BATCH-DATE
BEGINNING-RECEIPT-NUMBER
ENDING-RECEIPT-NUMBER

BUILDING PERMIT

Information on the building permit maintained by the city. This includes the date the permit, contact name, contact phone number and the permit number.

IS DESCRIBED BY:

PERMIT-DATE
CONTACT-NAME
CONTACT-PHONE-NUMBER
PERMIT-NUMBER

BUSINESS

Information retained on a business. This includes the contact name, contact phone number.

IS DESCRIBED BY:

CONTACT-NAME
CONTACT-PHONE-NUMBER

CENTRALLY ASSESSED

Information retained about centrally assessed property. This includes the assessed value, type of property, miles, mile type, rates per mile, state property classification, etc.

IS DESCRIBED BY:

TAX-YEAR
ASSESSED-VALUE
PROPERTY-TYPE
MILES
MILE-TYPE
RATE-PER-MILE
STATE-PROPERTY-CLASS-CODE

CERTIFIED ROLL CORRECTION

Information retained about a certified correction applied to the roll. This includes the voucher number, voucher code, who approved the correction, reason for correction, date processed, tax year affected, original value, and corrected value.

IS DESCRIBED BY:

VOUCHER-NUMBER
VOUCHER-CODE
PERSON-APPROVED-CORRECTION
CORRECTION-REASON
DATE-PROCESSED
TAX-YEAR
ORIGINAL-VALUE
CORRECTED-VALUE

COMMERCIAL/INDUSTRIAL COMPLEX

Information on the commercial or industrial complex in which the structure resides. This includes the contact name, contact phone number, common use of the complex, and the name of the complex.

IS DESCRIBED BY:

CONTACT-NAME
CONTACT-PHONE-NUMBER
COMMON-USE
COMPLEX-NAME

COMMERCIAL/INDUSTRIAL STRUCTURE

Information on commercial or industrial structure. Examples of information includes type of structure, building construction, square footage, and other characteristics.

IS DESCRIBED BY:

STRUCTURE-TYPE
BUILDING-CONSTRUCTION
SIZE
TAX-YEAR
APPRAISED-VALUE
ASSESSED-VALUE

COMMON FACILITY

Information on the common facility which is being shared by the improvements (e.g., condo, single family, multi-family), mobile home court, and moorage. This includes the type of facility, size, number of parking spaces, etc.

IS DESCRIBED BY:

FACILITY-TYPE
SIZE
TOTAL-PARKING-SPACES

COMPLAINT

Information on a complaint received via the telephone, mail, or in person. This includes the complaint issue, complaint date, person assigned, date resolved.

IS DESCRIBED BY:

COMPLAINT-ISSUE
COMPLAINT-DATE
PERSON-ASSIGNED
DATE-RESOLVED

CONDO COMPLEX

Information on the condo complex in which the condo units reside. This includes name of complex, contact name, contact phone number, etc.

IS DESCRIBED BY:

COMPLEX-NAME
CONTACT-NAME
CONTACT-PHONE-NUMBER

CONDO UNIT

Information on the condo unit. This includes the type of unit, unit number, construction features, inventory, quality of construction, room count, and other characteristics.

IS DESCRIBED BY:

UNIT-TYPE
UNIT-NUMBER
CONSTRUCTION-TYPE
CONSTRUCTION-QUALITY
ROOM-COUNT
TAX-YEAR
APPRAISED-VALUE
ASSESSED-VALUE
SIZE

COUNTY

Information on the county that provides taxing values and offsets, sales information, or the county that a piece of property spans including Multnomah.

IS DESCRIBED BY:

COUNTY-ID
COUNTY-NAME

COURT DOCUMENT

Information retained about a court document such as the court number, effective date, court, type of order, etc.

IS DESCRIBED BY:

COURT-NUMBER
EFFECTIVE-DATE
COURT
ORDER-TYPE

DEFERRAL

Information about the deferral granted or denied. This includes the type of deferral, effective date, deferral amount, senior citizen deferral percent, acreage, reason for denial, date denied, date canceled, etc.

IS DESCRIBED BY:

DEFERRAL-TYPE
EFFECTIVE-DATE
DEFERRAL-AMOUNT
SENIOR-CIT-DEF-PERCENT
ACREAGE
DENIAL-REASON
DATE-DENIED
DATE-CANCELED
TAX-YEAR

DEPOSIT

Information on the deposit made from the collection of various payments. This includes the deposit date, deposit amount, deposit person, type of deposit (split checks/cash), volume of checks, ending balance, ending drawer balance, cashier id.

IS DESCRIBED BY:

DEPOSIT-DATE
DEPOSIT-AMOUNT
DEPOSIT-PERSON
DEPOSIT-TYPE
TOTAL-CHECKS
ENDING-BALANCE
ENDING-DRAWER-BALANCE
CASHIER-ID

EMPLOYEE

Information on the name of the employee, assignment and date completed.

IS DESCRIBED BY:

EMPLOYEE-ID
EMPLOYEE-NAME
ASSIGNMENT
ASSIGNMENT-START-DATE
ASSIGNMENT-COMPLETED-DATE

EXEMPTION

Information on the exemption granted or denied. This includes the type of exemption, effective date, exemption amount, exemption percent, reason for denial, date denied, date canceled, etc.

IS DESCRIBED BY:

EXEMPTION-TYPE
EFFECTIVE-DATE
EXEMPTION-AMOUNT
EXEMPTION-PERCENT
DENIAL-REASON
DATE-DENIED
DATE-CANCELED
TAX-YEAR

EXEMPTION/DEFERRAL REQUEST

Information on the application/report received from the taxpayer, DOR, City, etc., requesting/allowing exemption or deferral. This includes the application number, application date, date received, acreage requested, major crops, length of construction, structure construction date, etc.

IS DESCRIBED BY:

APPLICATION-NUMBER
APPLICATION-DATE
DATE-RECEIVED
ACREAGE-REQUESTED
MAJOR-CROPS
LENGTH-OF-CONSTRUCTION
STRUCTURE-CONSTRUCTION-DATE

FARM/FOREST INTEREST RATES

Information on the Farm/Forest interest rates received from the DOR. This includes the soil type, property use, stock amount, etc.

IS DESCRIBED BY:

SOIL-TYPE
PROPERTY-USE
STOCK-AMOUNT
TAX-YEAR

FINANCIAL ACCOUNT

Information on a financial account which has been established due to money owed on a piece of property. This includes the tax year, tax balance owing, status of the account (delinquent, foreclosure, lien, etc.), and original tax balance.

IS DESCRIBED BY:

TAX-YEAR
TAX-BALANCE-OWING
ACCOUNT-STATUS
ORIGINAL-TAX-BALANCE

FINANCIAL ACCT TRANSACTION

Information retained about a transaction on a financial receivable account. This includes the tax year, transaction type, transaction date, amount received, refund check number, refund check date issued, stop payment date, reason for stop payment, etc.

IS DESCRIBED BY:

TAX-YEAR
TRANSACTION-TYPE
TRANSACTION-DATE
AMOUNT-RECEIVED
REFUND-CHECK-NUMBER
REFUND-CHECK-DATE-ISSUED
STOP-PAYMENT-DATE
STOP-PAYMENT-REASON

FLOATING STRUCTURE

Information retained on the characteristics of the floating structure. This includes quality of construction, room count, type of construction, marine board number, year, make, model, serial number, access method to land, assessed value, etc.

IS DESCRIBED BY:

CONSTRUCTION-QUALITY
ROOM-COUNT
CONSTRUCTION-TYPE
MARINE-BOARD-NUMBER
YEAR
MAKE
MODEL
SERIAL-NUMBER
ACCESS-METHOD-TO-LAND
ASSESSED-VALUE
TAX-YEAR
APPRAISED-VALUE

FORECLOSURE/REDEMPTION

Information about a foreclosure/redemption case. This includes the case number.

IS DESCRIBED BY:

CASE-NUMBER

FORECLOSURE/REDEMPTION ACTION

Information retained about an action on a foreclosure/redemption case. This includes the action type, date of action, who took action, action description, certification number.

IS DESCRIBED BY:

ACTION-TYPE
ACTION-DATE
WHO-TOOK-ACTION
ACTION-DESCRIPTION
CERTIFICATION-NUMBER

FOREST LAND RATES

Information on the Forest Land Rates including the WOST rates received from the DOR used to determine the forest land assessed value. This includes the soil type, value, rate.

IS DESCRIBED BY:

SOIL-TYPE
VALUE
RATE
TAX-YEAR

IMPROVEMENT BENCHMARK

Information on comparable sales which is used to determine the appraisal value for an improvement.

IMPROVEMENT DEPRECIATION SCHED

Information on the amount and schedule for depreciation which will be used to determine the appraisal value for an improvement.

IS DESCRIBED BY:

NEIGHBORHOOD
DEPRECIATION-PERCENT
EFFECTIVE-AGE

IMPROVEMENT STRUCTURE

Information retained on the characteristics of the improvement. This includes the type of construction, type of improvement, year built, size, appraised value, assessed value, etc.

IS DESCRIBED BY:

IMPROVEMENT-TYPE
IMPROVEMENT-SIZE
YEAR-BUILT
CONSTRUCTION-TYPE
COMMENTS
ASSESSED-VALUE
APPRAISED-VALUE
TAX-YEAR

INDUSTRIAL EQUIP/MACHINERY

Information on the characteristics of the industrial equipment and machinery. This includes the year of acquisition, manufacturer, capacity, model, serial number, assessed value, etc.

IS DESCRIBED BY:

TAX-YEAR
ASSESSED-VALUE
ACQUISITION-YEAR
MANUFACTURER
CAPACITY
MODEL
SERIAL-NUMBER
TYPE
CONDITION
DATE-RETIRED

INDUSTRIAL NOTICE

Information on either the real property return or election notice which is sent out on industrial property. This includes the date of the notice, type of notice, and when returned.

IS DESCRIBED BY:

NOTICE-DATE
NOTICE-TYPE
DATE-RETURNED

INTERESTED PARTY

Information on the business or person which has an interest a the piece of property. The information includes the name, date of birth, SSN, federal id, phone number, etc.

IS DESCRIBED BY:

INTERESTED-PARTY-NAME
DATE-OF-BIRTH
SOCIAL-SECURITY-NUMBER
FEDERAL-ID
PHONE-NUMBER

INTERESTED PARTY ADDRESS

Information on either mailing address or physical address for an interested party. This includes address information and identifying the statements and notices to be sent.

IS DESCRIBED BY:

ADDRESS-STREET
ADDRESS-CITY
ADDRESS-STATE
ADDRESS-ZIP
NOTICE-TYPE

INTERESTED PARTY ROLE

Information on the role that a business or person has in regards to the piece of property. The types of role can be owner, lien holder, lessee, lessor, filer, agent, etc. The type of information is the role and the date the role was established.

IS DESCRIBED BY:

ROLE-TYPE
ROLE-ESTABLISHED-DATE

LAND

Information on the unit or piece of land (including submerged land) which is identified by the tax roll description and at least part of the land resides in Multnomah County. This includes the levy code, district, size of property, tax roll description, appraised value, assessed value, and other characteristics.

IS DESCRIBED BY:

TAX-YEAR
APPRAISED-VALUE
ASSESSED-VALUE
DISTRICT
PROPERTY-SIZE
TAX-ROLL-DESCRIPTION

LAND BENCHMARK

Information on the land benchmarks which is used to determine the market value of land for appraisal purposes.

IS DESCRIBED BY:

TAX-YEAR
NEIGHBORHOOD
ITEM
BASE-VALUE
ADJUSTMENT-PERCENT

LAND ENHANCEMENT

Information on the enhancements which have been done to the piece of land which is used in determining the appraisal value. This information includes the type of street, utilities, easements, sidewalks, etc.

IS DESCRIBED BY:

STREET-TYPE
UTILITIES
EASEMENTS
SIDEWALKS

LEASE

The information on a lease, government or otherwise, which applies to a particular piece of property. This includes the length of lease, date of lease, terms, amount, etc.

IS DESCRIBED BY:

LEASE-RATE
LEASE-DATE
LEASE-TERM
SQ-FT-LEASED
EXPENSE-INCURRED

LOCAL COST MODIFIER

Information on the cost of new construction which assists in determining the replacement cost value.

IS DESCRIBED BY:

NEIGHBORHOOD
ITEM
RATE
SQ-FT-RANGE
MODIFIER

MAP

Information about a map, including the map number, location of map, and the digitized information.

IS DESCRIBED BY:

MAP-NUMBER
LOCATION
DIGITIZED-DETAIL

MARRIAGE CERTIFICATE

Information on a marriage certificate which has been issued. This includes the book/page, date issued, etc.

IS DESCRIBED BY:

BOOK-PAGE
ISSUE-DATE

MINISTER

Information on a minister who is authorized to perform marriages. This includes the name of the minister, mailing address, phone number, etc.

IS DESCRIBED BY:

MINISTER-NAME
MAILING-ADDRESS
PHONE-NUMBER

MINISTER LETTER

Information on the minister letter received which authorizes a minister to perform marriages in the State of Oregon. This includes the date received, etc.

IS DESCRIBED BY:

DATE-RECEIVED

MOBILE HOME

Information on the characteristics of a mobile home. This includes the DMV ID number, manufacturer, type of construction, year of acquisition, make, model, serial number, assessed value, etc.

IS DESCRIBED BY:

TAX-YEAR
APPRAISED-VALUE
ASSESSED-VALUE
DMV-ID-NUMBER
MANUFACTURER
CONSTRUCTION-TYPE
ACQUISITION-YEAR
MAKE
MODEL
SERIAL-NUMBER

MOBILE HOME COURT

Information on the mobile home court. This includes the contact name, contact phone number, the name of the court, and mailing address.

IS DESCRIBED BY:

CONTACT-NAME
CONTACT-PHONE-NUMBER
COURT-NAME
COURT-NUMBER
MAILING-ADDRESS

MOORAGE

Information on the characteristics of a moorage. This includes the contact name, contact phone number, the moorage name, walkways, pilings, sewer system, assessed value, etc.

IS DESCRIBED BY:

MOORAGE-NAME
WALKWAY
PILINGS
SEWER-SYSTEM
TAX-YEAR
ASSESSED-VALUE

MULTI-FAMILY

Information on the characteristics of a multi-family dwelling. This includes the inventory, room count, size, quality of construction, type of construction, etc.

IS DESCRIBED BY:

TAX-YEAR
APPRAISED-VALUE
ASSESSED-VALUE
SIZE
CONSTRUCTION-QUALITY
CONSTRUCTION-TYPE
TOTAL-ROOMS

NEIGHBORHOOD

Information on a neighborhood area which is used to group like characteristics and to delineate areas of similar economic characteristics.

IS DESCRIBED BY:

NEIGHBORHOOD-ID

NOTARY

Information on a notary who is certified. This includes the name of the notary, mailing address, phone number, etc.

IS DESCRIBED BY:

NOTARY-NAME
MAILING-ADDRESS
PHONE-NUMBER

NOTARY CERTIFICATION

Information about a notary certification. This includes the date received, date certified, etc.

IS DESCRIBED BY:

DATE-RECEIVED
DATE-CERTIFIED

NSF

Information about a NSF notification received from Finance. This includes the return date of the check, check amount and payor.

IS DESCRIBED BY:

CHECK-RETURN-DATE
CHECK-AMOUNT
PAYOR

PAYMENT

Information about a payment received. This includes the payor, the date received, the amount received, the method of payment, effective date, date processed, date applied, date postmarked.

IS DESCRIBED BY:

DATE-RECEIVED
PAYMENT-AMOUNT
PAYOR
PAYMENT-METHOD
EFFECTIVE-DATE
DATE-PROCESSED
DATE-APPLIED
DATE-POSTMARKED

PAYMENT PLAN

Information about a payment plan established for a financial account. This includes the terms, the amount due and the due date.

IS DESCRIBED BY:

AMOUNT-DUE
DUE-DATE

PERSON

Information on the person who has some type of interest in a piece of property. This includes the name of the person, phone number etc.

IS DESCRIBED BY:

PERSON-NAME
PHONE-NUMBER

PERSONAL PROP

Information on a group of personal property which is in the same levy code. This includes the quantity, acquisition cost, acquisition year, type of property, make, model, assessed value, etc.

IS DESCRIBED BY:

PROPERTY-TYPE
TAX-YEAR
ASSESSED-VALUE
QUANTITY
ACQUISITION-YEAR
ACQUISITION-COST
MAKE
MODEL

PERSONAL PROP COMPARABLE

Information on comparables for personal property.

PERSONAL PROP NOTICE

Information on personal property notices (e.g. late filings, penalties and extensions) which were sent out. This includes the date the notice was sent and type of notice.

IS DESCRIBED BY:

NOTICE-TYPE
DATE-MAILED

PERSONAL PROP RETURN

Information about the personal property return which was sent to and returned from the tax filer. This includes the date received, the taxpayer's estimated value, and the name of the tax filer.

IS DESCRIBED BY:

DATE-MAILED
DATE-RECEIVED
TAX-FILER-NAME
TAXPAYER-ESTIMATED-VALUE

PERSONAL PROP VALUE SCHEDULE

Information on the schedule used in valuing personal property. This includes the valuation category, acquisition year, and factor.

IS DESCRIBED BY:

TAX-YEAR
VALUATION-CATEGORY
ACQUISITION-YEAR
FACTOR

PROPERTY INCOME/RENT

Information on the income or rent which is collected on an improvement, houseboat, apartment, etc. This includes the amount, reason for income, projection, and term.

IS DESCRIBED BY:

TAX-YEAR
AMOUNT
INCOME-REASON
PROJECTION
TERM

PROPERTY MESSAGE

Information retained about a property action such as a building inspection, division/consolidation, etc. This includes the type of action, action date, reason, responsible party, completed date, etc.

IS DESCRIBED BY:

ACTION-TYPE
ACTION-DATE
REASON
RESPONSIBLE-PARTY
DATE-COMPLETED

PROPERTY RECORDED DOCUMENT

Information on a recorded document which has been received by the Assessment and Taxation on a piece of property. This includes the date and time received, book and page the document was recorded in, and the type of document received.

IS DESCRIBED BY:

BOOK-PAGE
DOCUMENT-TYPE
DATE-RECEIVED
TIME-RECEIVED

PROPERTY SALE

Information on property sales which have taken place and is used in the ratio study. This includes the date of sale, sale price, and terms of sale.

IS DESCRIBED BY:

BOOK-PAGE
SALE-DATE
SALE-PRICE
SALE-TERMS
SALE-USE-CODE

RECORDED DOCUMENT

Information on the deed, minister letter, notary record, marriage license, etc., which has been received. This includes the book/page, date received, time received, type of document, etc.

IS DESCRIBED BY:

BOOK-PAGE
DATE-RECEIVED
TIME-RECEIVED
DOCUMENT-TYPE

SALES CONFIRMATION

Information that is retained about a confirmation of a property sale. Confirmation may be by letter, phone, or on-site visit and the information gathered can include the sale price, terms of sale, instrument type, condition of property. The facts retained include the confirmation method used, confirmation date, reason for sale, and if personal property was involved in sale.

IS DESCRIBED BY:

DATE-MAILED
DATE-RECEIVED
SALE-REASON
PERSONAL-PROPERTY-INVOLVED

SERVICE DISTRICT

Information retained about a service district special assessment (fire patrol, street lighting, PUD election costs). This includes the tax year, effective date, type of special assessment, rate, advance recovery distribution, percent distribution turnover.

IS DESCRIBED BY:

TAX-YEAR
EFFECTIVE-DATE
SPECIAL-ASSESSMENT-TYPE
RATE
ADVANCE-RECOVERY-DISTRIB
DISTR-TURNOVER-PERCENT

SERVICE FEE

Information about a service provided to an agency which assists in billing. This includes the service date, service fee amount, and type of service provided.

IS DESCRIBED BY:

SERVICE-DATE
SERVICE-AMOUNT
SERVICE-TYPE

SEWER/DRAINAGE

Information retained about delinquent sewer liens and sewer/drainage special assessments received from Dunthorpe, Riverdale, etc., This includes the tax year, effective date, type of special assessment, assessed fee, percent distribution turnover.

IS DESCRIBED BY:

TAX-YEAR
EFFECTIVE-DATE
SPECIAL-ASSESSMENT-TYPE
ASSESSED-FEE
DISTR-TURNOVER-PERCENT

SINGLE FAMILY

Information on the characteristics about a single family dwelling. This includes the inventory, room count, size, quality of construction, type of construction, age, etc.

IS DESCRIBED BY:

TAX-YEAR
APPRAISED-VALUE
ASSESSED-VALUE
SIZE
TOTAL-ROOMS
CONSTRUCTION-QUALITY
CONSTRUCTION-TYPE
YEAR-BUILT

SITUS ADDRESS

Information on the situs address for the piece of real property. This includes the address which is established at the time of issuance of the building permit as well as the addresses which are being used by the occupants. The type of information is the street name, directional, city, zip code, street number, street type (e.g. lane, blvd.), etc.

IS DESCRIBED BY:

STREET-NAME
DIRECTION
STREET-TYPE
STREET-NUMBER
CITY
ZIP-CODE

SUMMARY SEIZURE ACTION

Information retained about an action on a property summary seizure. This includes the action type, action date, who took action, and the certification number.

IS DESCRIBED BY:

ACTION-TYPE
ACTION-DATE
WHO-TOOK-ACTION
CERTIFICATION-NUMBER

SURVEY

Information on a survey used to identify a particular piece of land. This includes the survey id, survey date, and who conducted the survey.

IS DESCRIBED BY:

SURVEY-ID
SURVEY-DATE
PERSON-THAT-SURVEYED

TAX DISTRICT

Information about a tax district and any subentities within the tax district that are to receive a percentage of tax money collected. This includes the tax year, district, district name, district account number, tax rate, percent distribution turnover, advance recovery distribution, amount levied.

IS DESCRIBED BY:

TAX-YEAR
DISTRICT-ACCOUNT
DISTRICT-NAME
TAX-RATE
AMOUNT-LEVIED
ADVANCE-RECOVERY-DISTRIB
DISTRIB-TURNOVER-PERCENT

TAX TURNOVER SCHEDULE

Information about the tax turnover schedule used by Finance for distributing funds to taxing, urban and service districts. This includes the distribution date, date to finance, and period ending date.

IS DESCRIBED BY:

DISTRIBUTION-DATE
DATE-TO-FINANCE
PERIOD-ENDING-DATE

TAXING VALUE/OFFSET

Information on the value and offsets for Multnomah County. This includes the value and offsets received from other counties, as well as the Fish and Game Commission. This includes the tax year, county, offset, and total taxable value.

IS DESCRIBED BY:

TAX-YEAR
COUNTY
OFFSET-AMOUNT
TOTAL-TAXABLE-VALUE

TAXPAYER NOTICE

Information about various notices (certified letter, 20-day letter, clerical error letter, value notification, etc.) sent to the taxpayer. This includes the certification number, date sent, hearing date, hearing time.

IS DESCRIBED BY:

NOTICE-TYPE
CERTIFICATION-NUMBER
DATE-SENT
HEARING-DATE

HEARING-TIME
TAX-AMOUNT
DUE-DATE

TREND FACTOR

Information on the trend factor by ratio code which is used in developing the assessment value for properties which were not in the current appraisal cycle.

IS DESCRIBED BY:

TAX-YEAR
NEIGHBORHOOD
RATIO-CODE
FACTOR

URBAN RENEWAL DISTRICT

Information on an urban renewal received from a city development commission. This includes the beginning tax year, district, frozen value, percent distribution turnover, tax rate.

IS DESCRIBED BY:

TAX-YEAR
DISTRICT
FROZEN-VALUE
TAX-RATE
DISTRIB-TURNOVER-PERCENT

UTILITY MILEAGE DISTRIBUTION

Information retained about the utility mileage distribution. This includes the company name, miles description, amount of miles, levy codes, and shared ownership percentage.

IS DESCRIBED BY:

COMPANY-NAME
MILES-DESCRIPTION
TOTAL-MILES
LEVY-CODES
SHARED-OWNERSHIP-PERCENT

ZONE

Information describing the zone.

APPENDIX G
COST SUMMARY FORM

APPENDIX G COST SUMMARY FORM

<u>APPLICATION MODULE</u>	<u>PURCHASE PRICE* (\$)</u>	<u>MONTHLY MAINTENANCE (\$)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
TOTAL	_____	_____

*Includes license fee.

<u>OVERALL COSTS</u>	<u>PRICE (\$)</u>
DMBS (estimated)	_____
Data Dictionary Interface (specify type)	_____
Query Language	_____
Other (please specify)	_____

7-18-89

REQUEST FOR PLACEMENT ON THE AGENDA

SUBJECT: _____

Informal only July 18, 1989
(date)

Formal only _____
(date)

Department DES Division Planning and Development

Contact Lorna Stickel Telephone 248-3182

(If informal, name of person making presentation)

Brief Summary (should include other alternatives explored, if applicable, and clear statement of rationale for the action requested):

Discussion of recommendation on a locational adjustment petition to Metro to add land to the Urban Growth Boundary near Gresham

(IF ADDITIONAL SPACE IS NEEDED, PLEASE USE REVERSE SIDE)

ACTION REQUESTED:

- Information only
- Policy direction
- Preliminary approval
- Approval

IMPACT:

- Personnel
- Fiscal/Budgetary
General Fund

Other _____

BOARD OF
 COUNTY COMMISSIONERS
 1989 JUL 12 AM 11:07
 MULTNOMAH COUNTY
 OREGON

SIGNATURES:

Department Head or County Commissioner
Office of County Management _____

Office of County Counsel _____
(Ordinances, resolutions, agreements, contracts)

Department of Administrative Services _____
(Leases, surplus property, space, purchasing, etc.)

Department of Intergovernmental Relations _____
(Items with impact on other jurisdictions)



MULTNOMAH COUNTY OREGON

DIVISION OF PLANNING & DEVELOPMENT, 2115 S.E. MORRISON/PORTLAND, OREGON 97214

July 7, 1989

MEMORANDUM

To: Board of County Commissioners

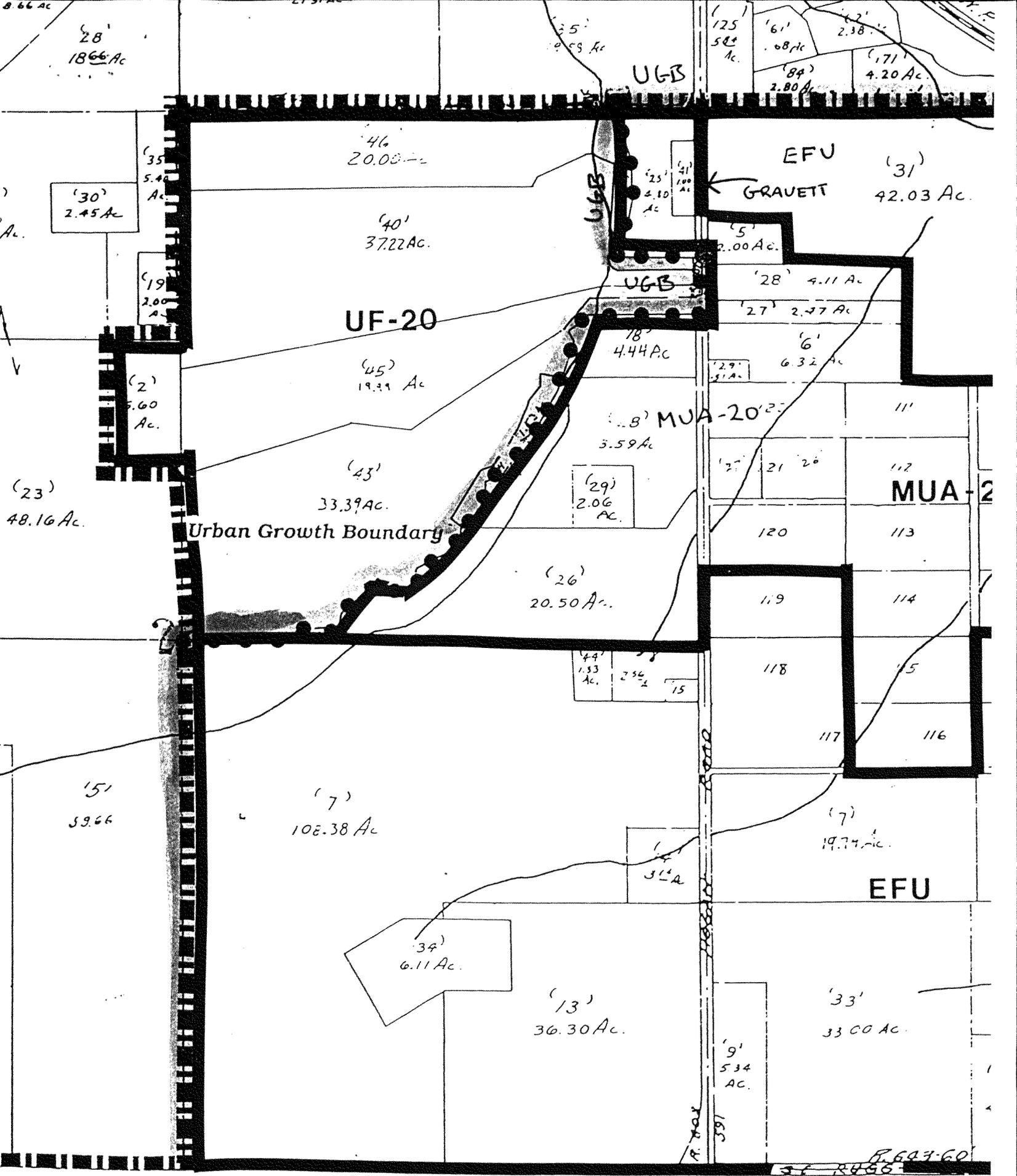
From: Lorna Stickel 

Subject: Recommendation on a locational adjustment petition to METRO to add land to Urban Growth Boundary near Gresham

Attached is a petition to METRO by Mr and Mrs Paul Gravett to amend the Urban Growth Boundary south of Gresham along SE Hogan Road. This would be a locational adjustment to add 5.80 acres into the urban area. METRO regulations require a response from the affected jurisdiction's governing body before an application can be processed by METRO. This response is needed by July 24th. The METRO rules give a jurisdiction six months to respond after a request has been made to the affected jurisdiction. A jurisdiction may respond by recommending approval, denial, or no comment. The Gravetts' did not ask for this response until June 28, 1989. Because the time frame is so short due to the applicant's late request and due to the legal ramifications of a local government response and its possible future quasi-judicial role, the Planning Division recommends no comment as our response in this matter. The Planning Division will, however, provide some comments for the METRO staff evaluation of this petition.

The County has no procedures for considering these requests other than a plan amendment which would be premature to a METRO decision. It is METRO's statutory role to make decisions on amendments to the UGB. Staff is working on the METRO Technical Advisory Committee on urban growth management. One of the tasks of that group is to review proposed changes to the METRO regulations on UGB amendments. At some point the County will want to adopt some procedures for urban growth boundary amendment proposals.

LS:sec



'28'
1866 Ac.

'25'
9.59 Ac.

'125'
58.9 Ac.

'61'
0.87 Ac.

'238'

'171'
4.20 Ac.

'84'
2.80 Ac.

UGB

'35'
5.4 Ac.

'30'
2.45 Ac.

'46'
20.00 Ac.

'40'
37.22 Ac.

EFU

'31'
42.03 Ac.

GRAVETT

'19'
2.00 Ac.

UF-20

UGB

'28'
4.11 Ac.

'27'
2.97 Ac.

'2'
5.60 Ac.

'45'
19.39 Ac.

'18'
4.44 Ac.

'6'
6.32 Ac.

'18' MUA-20
3.59 Ac.

MUA-2

'23'
48.16 Ac.

'43'
33.39 Ac.

'29'
2.06 Ac.

Urban Growth Boundary

'26'
20.50 Ac.

'27'
21' 26'

111

112

113

114

115

116

120

119

118

117

'7'
19.74 Ac.

EFU

'51'
39.66

'7'
108.38 Ac.

'34'
6.11 Ac.

'13'
36.30 Ac.

'33'
33.00 Ac.

'9'
5.34 Ac.

R. WAY
397

R. 643-60
31-2456

JEFFREY L. KLEINMAN
ATTORNEY AT LAW
THE AMBASSADOR
1207 S.W. SIXTH AVENUE
PORTLAND, OREGON 97204

(503) 248-0808

June 28, 1989

Ms. Lorna Stickel, Planning Director
Multnomah County Department of Planning & Zoning
2115 SE Morrison
Portland, OR 97214

Re: Paul and Shirley Gravett
6605 SE Hogan Road, Gresham
Petition for Locational Adjustment
to the Metro Urban Growth Boundary

Dear Ms. Stickel:

I represent Paul and Shirley Gravett, owners of the property described above, and marked with arrows on the enclosed map. On June 29, 1989, I will be filing a petition with the Metropolitan Service District in order to expand the Urban Growth Boundary to include this property. The property is surrounded on three sides by land which is within the Urban Growth Boundary. It is zoned MUA 20, and is excepted from LCDC Goals 3 and 4.

Metro's rules require Multnomah County to review the Gravetts' petition and, in particular, require a response from the Board of County Commissioners. This would be in the format of the brief comment form, a copy of which I am also enclosing. Metro has established very strict deadlines for this review, and we would need if all possible to have the county take action no later than July 24, 1989.

I would therefore request that the Gravetts' petition be put on the agenda of the Board of Commissioners as soon as possible. Based upon discussions with the planning staffs for Multnomah County and the City of Gresham, I do not believe that there are any significant difficulties with respect to this petition.

Ms. Lorna Stickel
June 28, 1989
Page 2

Thank you for your courtesies and cooperation. I will be forwarding a copy of the Gravetts' application within the next day or two, together with an original of the comment form. If you have any questions, please do not hesitate to give me a call.

Very truly yours,



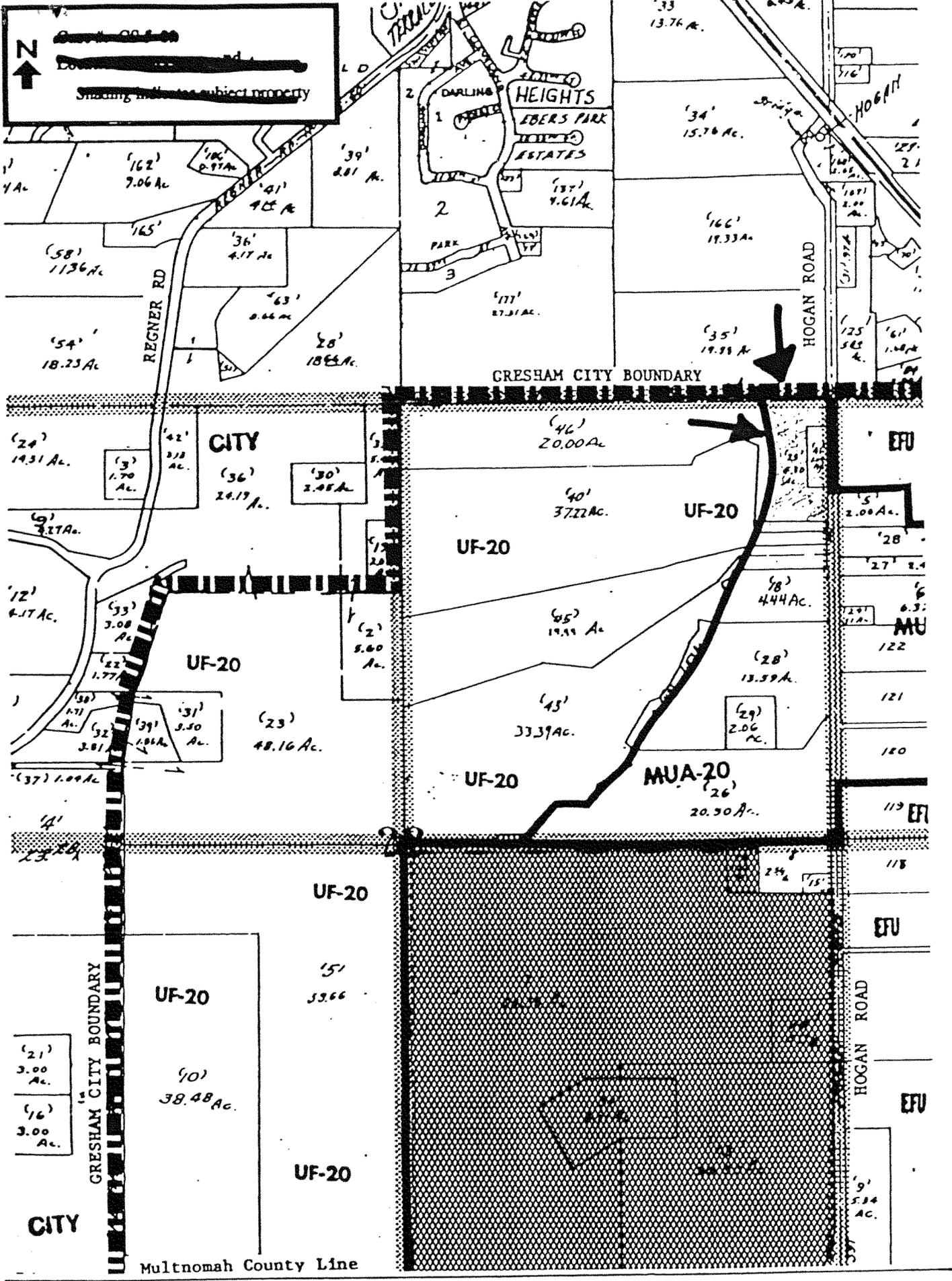
Jeffrey L. Kleinman

JLK:jr
Enc.
cc: Clerk of Multnomah County
Board of County Commissioners
Paul and Shirley Gravett

RECEIVED
JUN 29 1989

Multnomah County
Zoning Division

Streaming indicates subject property



Multnomah County Line
 Clackamas County Line

Request for Comment from Service Provider

(Part I to be completed by petitioner and submitted to each service provider listed on "Summary of Requests for Comments from Service Providers." Part II to be completed by the service provider and returned to Land Use Coordinator, Metropolitan Service District, 2000 S.W. 1st Avenue, Portland, Oregon 97201-5398)

Part I

To: _____
Name of Service Provider

From: _____
Name of Petitioner

Attached is a copy of a petition for a locational adjustment to Metro's Urban Growth Boundary (UGB). Please review this petition and submit your comments on it to Metro as soon as possible, but NO LATER THAN _____.

In general, land placed inside the UGB will develop to a residential density of at least four units a net acre or for urban commercial or industrial use, as determined by local zoning. Land outside the UGB cannot be served by sewer, and generally, cannot be developed at more than one unit to the net acre. In reviewing this petition, please consider: (1) whether its approval would make it easier (less expensive) or harder (more expensive) to serve other, adjacent areas for which service is planned or expected; and (2) how easy or difficult it would be to extend your service to the area included in the petition if the petition were approved.

Thank you for your help. Please call the Land Use Coordinator, at Metro, 221-1646, if you have any questions.

Part II

I have reviewed the attached petition for a locational adjustment to Metro's UGB and I:

_____ Support Approval

_____ Oppose Approval

_____ Have No Comment

_____ Support with Conditions

Comments and explanation (explain any conditions)

(Attach additional pages if needed.)

Signed _____

Date _____

Title _____

JEFFREY L. KLEINMAN
ATTORNEY AT LAW
THE AMBASSADOR
1207 S.W. SIXTH AVENUE
PORTLAND, OREGON 97204

(503) 248-0808

June 30, 1989

RECEIVED
JUL 03 1989

Multnomah County
Zoning Division

Ms. Lorna Stickel, Planning Director
Multnomah County Department of Planning & Zoning
2115 SE Morrison
Portland, OR 97214

Re: Paul and Shirley Gravett
6605 SE Hogan Road, Gresham
Petition for Locational Adjustment
to the Metro Urban Growth Boundary

Dear Ms. Stickel:

Enclosed is a copy of the comment form I mentioned to you in my letter dated June 28, 1989, together with a copy of the petition we have filed with Metro. I apologize for the time constraints in this matter, and would be happy to assist you in any way to achieve its prompt resolution.

Thank you again for your courtesies and assistance.

Very truly yours,


Jeffrey L. Kleinman

JLK:jr
Enc.
cc: Paul and Shirley Gravett

Request for Comment from Service Provider

(Part I to be completed by petitioner and submitted to each service provider listed on "Summary of Requests for Comments from Service Providers." Part II to be completed by the service provider and returned to Land Use Coordinator, Metropolitan Service District, 2000 S.W. 1st Avenue, Portland, Oregon 97201-5398)

Part I

To: Multnomah County
Name of Service Provider

From: Paul D. and Shirley P. Gravett, c/o Jeffrey L. Kleinman, Attorney
Name of Petitioner

Attached is a copy of a petition for a locational adjustment to Metro's Urban Growth Boundary (UGB). Please review this petition and submit your comments on it to Metro as soon as possible, but NO LATER THAN July 24, 1989.

In general, land placed inside the UGB will develop to a residential density of at least four units a net acre or for urban commercial or industrial use, as determined by local zoning. Land outside the UGB cannot be served by sewer, and generally, cannot be developed at more than one unit to the net acre. In reviewing this petition, please consider: (1) whether its approval would make it easier (less expensive) or harder (more expensive) to serve other, adjacent areas for which service is planned or expected; and (2) how easy or difficult it would be to extend your service to the area included in the petition if the petition were approved.

Thank you for your help. Please call the Land Use Coordinator, at Metro, 221-1646, if you have any questions.

Part II

I have reviewed the attached petition for a locational adjustment to Metro's UGB and I:

Support Approval Oppose Approval
 Have No Comment Support with Conditions

Comments and explanation (explain any conditions)

(Attach additional pages if needed.)

Signed _____ Date _____

Title _____

Petition for Locational Adjustment to
Metro's Urban Growth Boundary (UGB) (check one):

addition removal

Note: To add land in one location and remove land in another, please complete one form for the addition and another for the removal.

1. a. Petitioner's name and address:

Paul D. Gravett and Shirley P. Gravett
6605 SE Hogan Road
Gresham, Oregon 97080
Phone number: 661-3357

b. Contact person, if other than petitioner (consultant or attorney) or if petitioner is a local government:

Jeffrey L. Kleinman, Attorney
1207 SW Sixth Avenue
Portland, Oregon 97204
Phone number: 248-0808

2. What is petitioner's interest in the property:

- Property Owner
 Contract Buyer
 Option to buy
 Other legal interest (Specify: _____)
 Local government

3. County in which property is located: Multnomah

4. If the locational adjustment requested were approved, would you seek annexation to (or de-annexation from) a city?

Yes, the City of Gresham
 No

5. Description of properties included in the petition (list each lot individually and attach a copy of the appropriate tax assessor's map(s)):

a. Legal Description
(Township, Range,
Section, Lot): See Exhibit A, attached.

Note: The legal description does not distinguish between the two tax lots on the property, Tax Lots 41 and 25.

- b. Acres: 5.8
- c. Owner's Name & Address (Mark "Same" if same as petitioner): same
- d. Improvements on property (e.g., none, one single family dwelling, barn, gas station, etc.): One single family dwelling, one metal pole barn

Attach additional sheets as needed.

6. a. What sewerage facilities currently serve the property?

- None, all land is vacant
- Package sewage treatment plant
- Sewer Line to public system
- Septic Tank

b. If septic tanks, have any septic tanks in the area failed?

- Yes, (Explain: _____)
- No

7. How close is the nearest sewer trunk? Near Hogan Road's crossing of Johnson Creek

8. a. Are additional sewer trunks for the area planned?

- Yes
- No

b. If yes, how close to the property would planned sewer lines run? Adjoining property line along Hogan Creek

9. How is water provided to the property?

- Private Well
- _____ inch water line provided by _____ (city or water district)
- No water provided

10. How close is the nearest water main? On Hogan Road, just north of Johnson Creek, 3,000 feet from the property

11. a. Are additional water mains for the area planned?

Yes No

b. How close to the property would planned water lines run? Across Hogan Creek and also adjacent to the property along Hogan Road

12. Are there any natural or man-made boundaries to development running along or near your property (rivers, cliffs, etc.)?

Yes (Describe: Hogan Creek, as indicated on attached map)

Mark location on assessor's map or attach other map or photo.

No

13. What is the current local plan designation of the property? MUA

14. What is the current local zoning designation? MUA 20

15. Does the comprehensive plan identify any natural hazards in this area?

Yes (Describe and explain applicable comprehensive plan policies: _____)

No

16. Does the comprehensive plan identify any natural or historic resources in this area?

Yes (Describe resources and explain applicable plan policies: See answer on attached sheet)

17. How do you plan to develop the property if your petition is approved?

The petitioners presently intend to subdivide the property to allow for five additional one-family homes.

18. On a separate sheet of paper, please discuss how approval of your petition would comply with each of the applicable standards from the Metro Code (attached green sheets). Only petitions found consistent with these standards may be approved. Metro staff will use the information received from

this petition, the local government, and other sources as needed, to prepare a list of questions for the Hearings Officer on whether these standards have been met. You and other parties may then submit any additional testimony in support of or opposition to the petition at the hearing. The Hearings Officer will then weigh the testimony received and submit the findings and recommendations to the Metro Council for action.

18. Petitioners Signatures

I/WE THE UNDERSIGNED HEREBY PETITION THE METROPOLITAN SERVICE DISTRICT TO ADD TO/REMOVE FROM THE URBAN GROWTH BOUNDARY THE PROPERTY DESCRIBED HEREIN.

SIGNED,

<u>Name</u>	<u>Tax Lot</u>	<u>Date</u>
PAUL D. GRAVETT and SHIRLEY P. GRAVETT <i>Jeffrey L. Kleinman</i>	41, 25	6/29/89
By: Jeffrey L. Kleinman Attorney		

JH/gl
2383B/223
05/07/87

A tract of land situated in the Northeast one-quarter of Section 22, Township 1 South, Range 3 East of the Willamette Meridian in the County of Multnomah and State of Oregon, more particularly described as follows:

Commencing at the Northeast corner of said Section 22; thence South $88^{\circ}22'57''$ West, along the North line thereof, a distance of 25.00 feet to a point in the West line of Hogan Road, and the point of beginning of the tract herein to be described; thence South $0^{\circ}03'30''$ East, along said West line, a distance of 741.59 feet to a point; thence South $89^{\circ}56'30''$ West, at right angles to said West line, a distance of 410.85 feet to the centerline of a creek; thence Northerly, along said centerline, the following courses and distances; North $23^{\circ}11'50''$ East 25.60 feet; North $15^{\circ}40'30''$ East, 195.27 feet; North $0^{\circ}50'00''$ East, 120.11 feet; North $2^{\circ}57'40''$ West 179.53 feet; and North $15^{\circ}15'40''$ West, a distance of 228.24 feet to a point in the North line of said Section 22; thence North $88^{\circ}22'57''$ East, along said North line, a distance of 415.00 feet to the point of beginning.

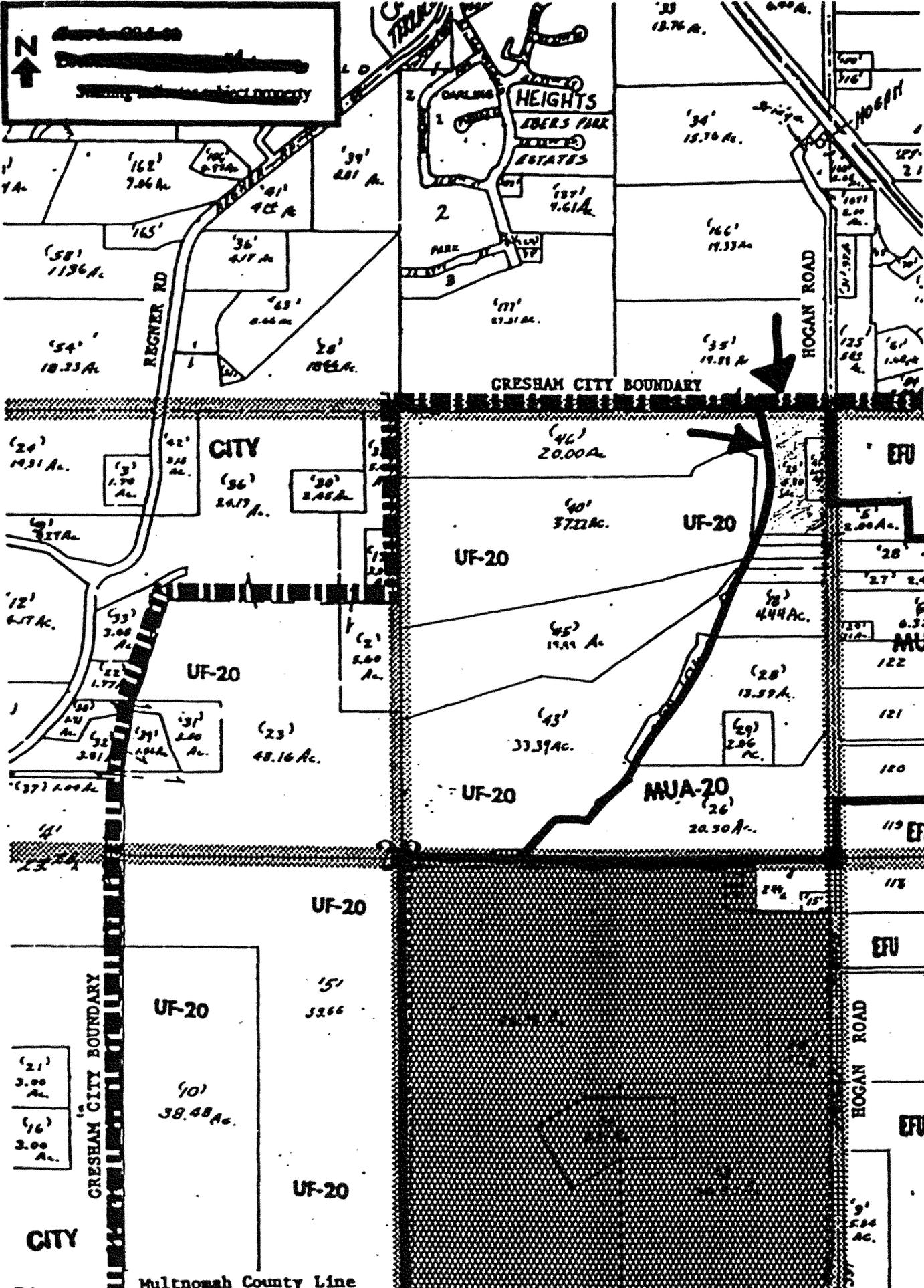
SAVE AND EXCEPT that part deeded to Errol A. Bascue and Lois S. Bascue by deed dated January 30, 1976.



 N

 Direction of Survey

 Surveying and Mapping Authority



16. The comprehensive plan identifies no historic resources in this area. It identifies one natural resource, Hogan Creek, which is in the national wetlands inventory. Policy No. 16 on natural resources is designated to protect natural resources and minimize negative effects upon them. In this instance, the policy is to minimize impact upon of natural streambanks and riparian areas. Any development of the property will be carried out accordingly.

18. Compliance with Applicable Standards of Metro Code Section 3.01.040.

3.010.040(a)(1) The proposed addition will assist in the orderly and economic provision of public facilities and services, and will result in a net improvement to those facilities and services. The area to be added is also capable of being served in an orderly and economical fashion.

The subject property is located directly on Hogan Road, and is surrounded on three sides by the Urban Growth Boundary. The property in essence comprises an isolated island of non-UGB land on the west side of Hogan Road. The reasons for initially excluding the property from the UGB are unknown, and no such reason is apparent from comparison of the property with those adjoining it within the UGB.

It would be far more efficient to have all the land in this area west of Hogan Road and west of the ridge line of the Hogan Creek drainage located in the Urban Growth Boundary. (All of the other properties in this area which lie entirely within the Hogan Creek drainage are also within the UGB.) It would be highly inefficient to provide separate water, sewerage, and fire protection services to this one parcel. In fact, this could be a source of confusion to public agencies, especially with respect to police and fire protection. Further, the City of Gresham is presently adding and/or planning to add additional water supply and a new sewer line directly across Hogan Creek from the affected property. It would be most efficient and cost effective for the city to be able to supply the subject property with these services, as the property is entirely within the drainage of Hogan Creek and that drainage area is planned for development. It would negatively affect the city's urban development plans for this parcel to be excluded from the Urban Growth Boundary. The availability of this property for sewer and water lines and roads providing access to adjoining properties is an important benefit to the City of Gresham.

(a)(2) For the same reasons set forth above, this addition to the UGB would allow for maximum efficiency of land uses and would facilitate needed development on adjacent existing urban land. In fact, the island-like nature of this property projecting into the UGB clearly establishes the benefits to adjoining urban land of having it included within the UGB.

Under the Metro staff definition of the term "needed" as meaning "consistent with the local comprehensive plan and/or applicable regional plans", it should be noted that the City of Gresham's plans designate this entire area west of the Hogan Creek ridge line for urban development. The city's comprehensive plan calls for the annexation of all such surrounding properties, with residential development to be carried out under LDR 7 zoning.

(a)(3) Including the subject property within the UGB will have only positive environmental, energy, economic and social consequences. It would make no sense from either the environmental, energy, economic or social standpoint to have a tiny island of MUA 20 property surrounded by properties zoned LDR 7. The City of Gresham's development plans would negatively impact the subject property from both the environmental and social viewpoints if it were required to remain in agricultural use. As long as the surrounding area is to be developed, it would be wasteful of energy not to complete the road system by using the subject property, and it would comprise economic waste to leave this island of nominally designated farmland untouched and unusable amidst the surrounding residential development. There will be no impact on regional transit corridor development, except to the extent that land uses along the west side of Hogan Road will be made consistent, and this could only be a positive impact.

As has been indicated in the petition, Hogan Creek is identified as a natural resource within the national wetlands inventory. The entire drainage of Hogan Creek in this area is to be developed, and any development of the subject property would fully recognize the need to protect the natural streambank and the riparian areas immediately along Hogan Creek.

(a)(4) The subject property is expressly excluded by Multnomah County from LCDC Goals 3 and 4, and the issue of retention of agricultural land is therefore inapplicable here.

(a)(5) As has been stated, the urban use proposed for the subject property would be entirely consistent with the urban uses surrounding it on three sides. In this sense, the justifications set forth above in terms of factors (1) through (3) outweigh in every respect the adverse impact of any incompatibility which might result from the proposed use. In fact, retaining agricultural use of the subject property would in itself create an adverse impact because of its incompatibility with the surrounding urban development.

(d)(2) For all the reasons set forth above, the UGB proposed by the petitioners is superior to the presently located UGB. This is the classic case in which a minor addition comprises 100 percent of all similarly situated contiguous land which could be appropriately included within the UGB. In essence, this proposal alleviates the problems created by the existing UGB, into which the subject property projects like a sore thumb.

(d)(3) The subject property comprises 5.8 acres and hence falls squarely within the acreage requirements of this subsection. Because of the small size of the property, the burden of showing differences between the suitability of the proposed UGB and the suitability of the existing UGB is less in this case than it otherwise would be.

Request for Comment from Service Provider

*Briefing
7-18-89
Handout
#2*

(Part I to be completed by petitioner and submitted to each service provider listed on "Summary of Requests for Comments from Service Providers." Part II to be completed by the service provider and returned to Land Use Coordinator, Metropolitan Service District, 2000 S.W. 1st Avenue, Portland, Oregon 97201-5398)

Part I

To: Multnomah County
Name of Service Provider

From: Paul D. and Shirley P. Gravett, c/o Jeffrey L. Kleinman, Attorney
Name of Petitioner

Attached is a copy of a petition for a locational adjustment to Metro's Urban Growth Boundary (UGB). Please review this petition and submit your comments on it to Metro as soon as possible, but NO LATER THAN July 24, 1989.

In general, land placed inside the UGB will develop to a residential density of at least four units a net acre or for urban commercial or industrial use, as determined by local zoning. Land outside the UGB cannot be served by sewer, and generally, cannot be developed at more than one unit to the net acre. In reviewing this petition, please consider: (1) whether its approval would make it easier (less expensive) or harder (more expensive) to serve other, adjacent areas for which service is planned or expected; and (2) how easy or difficult it would be to extend your service to the area included in the petition if the petition were approved.

Thank you for your help. Please call the Land Use Coordinator, at Metro, 221-1646, if you have any questions.

Part II

I have reviewed the attached petition for a locational adjustment to Metro's UGB and I:

- | | |
|---|--|
| <input type="checkbox"/> Support Approval | <input type="checkbox"/> Oppose Approval |
| <input checked="" type="checkbox"/> Have No Comment | <input type="checkbox"/> Support with Conditions |

Comments and explanation (explain any conditions)

(Attach additional pages if needed.)

Signed Gladys McRay

Date 7/20/89

Title Multnomah County Chair

Copy mailed to Jeffrey Klein on 7-20-89

Petition for Locational Adjustment to
Metro's Urban Growth Boundary (UGB) (check one):

addition removal

Note: To add land in one location and remove land in another,
please complete one form for the addition and another for
the removal.

1. a. Petitioner's name and address:

Paul D. Gravett and Shirley P. Gravett
6605 SE Hogan Road
Gresham, Oregon 97080
Phone number: 661-3357

b. Contact person, if other than petitioner (consultant or
attorney) or if petitioner is a local government:

Jeffrey L. Kleinman, Attorney
1207 SW Sixth Avenue
Portland, Oregon 97204
Phone number: 248-0808

2. What is petitioner's interest in the property:

Property Owner
 Contract Buyer
 Option to buy
 Other legal interest (Specify: _____)
 Local government

3. County in which property is located: Multnomah

4. If the locational adjustment requested were approved, would you
seek annexation to (or de-annexation from) a city?

Yes, the City of Gresham
 No

5. Description of properties included in the petition (list each
lot individually and attach a copy of the appropriate tax
assessor's map(s)):

a. Legal Description
(Township, Range,
Section, Lot): See Exhibit A, attached.

Note: The legal description does not distinguish
between the two tax lots on the property, Tax Lots
41 and 25.

- b. Acres: 5.8
- c. Owner's Name & Address (Mark "Same" if same as petitioner): same
- d. Improvements on property (e.g., none, one single family dwelling, barn, gas station, etc.): One single family dwelling, one metal pole barn

Attach additional sheets as needed.

6. a. What sewerage facilities currently serve the property?

- None, all land is vacant
- Package sewage treatment plant
- Sewer Line to public system
- Septic Tank

b. If septic tanks, have any septic tanks in the area failed?

- Yes, (Explain: _____)
- No

7. How close is the nearest sewer trunk? Near Hogan Road's crossing of Johnson Creek

8. a. Are additional sewer trunks for the area planned?

- Yes No

b. If yes, how close to the property would planned sewer lines run? Adjoining property line along Hogan Creek

9. How is water provided to the property?

- Private Well
- inch water line provided by _____ (city or water district)
- No water provided

10. How close is the nearest water main? On Hogan Road, just north of Johnson Creek, 3,000 feet from the property

11. a. Are additional water mains for the area planned?

Yes No

b. How close to the property would planned water lines run? Across Hogan Creek and also adjacent to the property along Hogan Road

12. Are there any natural or man-made boundaries to development running along or near your property (rivers, cliffs, etc.)?

Yes (Describe: Hogan Creek, as indicated on attached map)

Mark location on assessor's map or attach other map or photo.

No

13. What is the current local plan designation of the property? MUA

14. What is the current local zoning designation? MUA 20

15. Does the comprehensive plan identify any natural hazards in this area?

Yes (Describe and explain applicable comprehensive plan policies: _____)

No

16. Does the comprehensive plan identify any natural or historic resources in this area?

Yes (Describe resources and explain applicable plan policies: See answer on attached sheet)

17. How do you plan to develop the property if your petition is approved?

The petitioners presently intend to subdivide the property to allow for five additional one-family homes.

18. On a separate sheet of paper, please discuss how approval of your petition would comply with each of the applicable standards from the Metro Code (attached green sheets). Only petitions found consistent with these standards may be approved. Metro staff will use the information received from

this petition, the local government, and other sources as needed, to prepare a list of questions for the Hearings Officer on whether these standards have been met. You and other parties may then submit any additional testimony in support of or opposition to the petition at the hearing. The Hearings Officer will then weigh the testimony received and submit the findings and recommendations to the Metro Council for action.

18. Petitioners Signatures

I/WE THE UNDERSIGNED HEREBY PETITION THE METROPOLITAN SERVICE DISTRICT TO ADD TO/REMOVE FROM THE URBAN GROWTH BOUNDARY THE PROPERTY DESCRIBED HEREIN.

SIGNED,

Name PAUL D. GRAVETT and
SHIRLEY P. GRAVETT

Tax Lot

Date

Jeffrey L. Kleinman
By: Jeffrey L. Kleinman
Attorney

41, 25

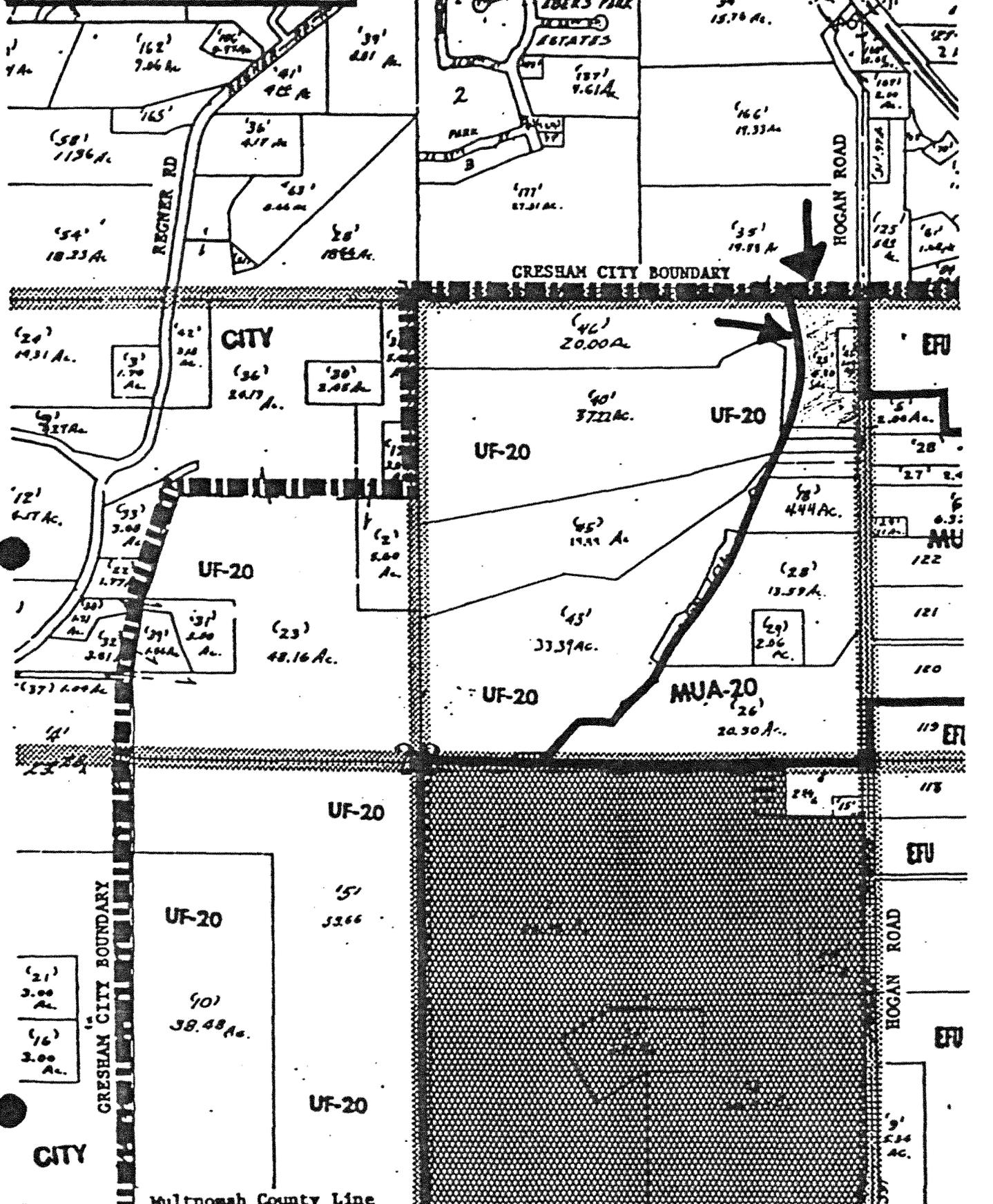
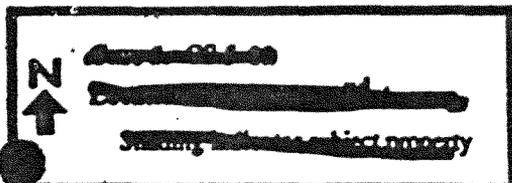
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A tract of land situated in the Northeast one-quarter of Section 22, Township 1 South, Range 3 East of the Willamette Meridian in the County of Multnomah and State of Oregon, more particularly described as follows:

Commencing at the Northeast corner of said Section 22; thence South $88^{\circ}22'57''$ West, along the North line thereof, a distance of 25.00 feet to a point in the West line of Hogan Road, and the point of beginning of the tract herein to be described; thence South $0^{\circ}03'30''$ East, along said West line, a distance of 741.59 feet to a point; thence South $89^{\circ}56'30''$ West, at right angles to said West line, a distance of 410.85 feet to the centerline of a creek; thence Northerly, along said centerline, the following courses and distances; North $23^{\circ}11'50''$ East 25.60 feet; North $15^{\circ}40'30''$ East, 195.27 feet; North $0^{\circ}50'00''$ East, 120.11 feet; North $2^{\circ}57'40''$ West 179.53 feet; and North $15^{\circ}15'40''$ West, a distance of 228.24 feet to a point in the North line of said Section 22; thence North $88^{\circ}22'57''$ East, along said North line, a distance of 415.00 feet to the point of beginning.

SAVE AND EXCEPT that part deeded to Errol A. Bascue and Lois S. Bascue by deed dated January 30, 1976.



Multnomah County Line
Clackamas County Line

16. The comprehensive plan identifies no historic resources in this area. It identifies one natural resource, Hogan Creek, which is in the national wetlands inventory. Policy No. 16 on natural resources is designated to protect natural resources and minimize negative effects upon them. In this instance, the policy is to minimize impact upon of natural streambanks and riparian areas. Any development of the property will be carried out accordingly.

18. Compliance with Applicable Standards of Metro Code Section 3.01.040.

3.010.040(a)(1) The proposed addition will assist in the orderly and economic provision of public facilities and services, and will result in a net improvement to those facilities and services. The area to be added is also capable of being served in an orderly and economical fashion.

The subject property is located directly on Hogan Road, and is surrounded on three sides by the Urban Growth Boundary. The property in essence comprises an isolated island of non-UGB land on the west side of Hogan Road. The reasons for initially excluding the property from the UGB are unknown, and no such reason is apparent from comparison of the property with those adjoining it within the UGB.

It would be far more efficient to have all the land in this area west of Hogan Road and west of the ridge line of the Hogan Creek drainage located in the Urban Growth Boundary. (All of the other properties in this area which lie entirely within the Hogan Creek drainage are also within the UGB.) It would be highly inefficient to provide separate water, sewerage, and fire protection services to this one parcel. In fact, this could be a source of confusion to public agencies, especially with respect to police and fire protection. Further, the City of Gresham is presently adding and/or planning to add additional water supply and a new sewer line directly across Hogan Creek from the affected property. It would be most efficient and cost effective for the city to be able to supply the subject property with these services, as the property is entirely within the drainage of Hogan Creek and that drainage area is planned for development. It would negatively affect the city's urban development plans for this parcel to be excluded from the Urban Growth Boundary. The availability of this property for sewer and water lines and roads providing access to adjoining properties is an important benefit to the City of Gresham.

(a)(2) For the same reasons set forth above, this addition to the UGB would allow for maximum efficiency of land uses and would facilitate needed development on adjacent existing urban land. In fact, the island-like nature of this property projecting into the UGB clearly establishes the benefits to adjoining urban land of having it included within the UGB.

Under the Metro staff definition of the term "needed" as meaning "consistent with the local comprehensive plan and/or applicable regional plans", it should be noted that the City of Gresham's plans designate this entire area west of the Hogan Creek ridge line for urban development. The city's comprehensive plan calls for the annexation of all such surrounding properties, with residential development to be carried out under LDR 7 zoning.

(a)(3) Including the subject property within the UGB will have only positive environmental, energy, economic and social consequences. It would make no sense from either the environmental, energy, economic or social standpoint to have a tiny island of MUA 20 property surrounded by properties zoned LDR 7. The City of Gresham's development plans would negatively impact the subject property from both the environmental and social viewpoints if it were required to remain in agricultural use. As long as the surrounding area is to be developed, it would be wasteful of energy not to complete the road system by using the subject property, and it would comprise economic waste to leave this island of nominally designated farmland untouched and unusable amidst the surrounding residential development. There will be no impact on regional transit corridor development, except to the extent that land uses along the west side of Hogan Road will be made consistent, and this could only be a positive impact.

As has been indicated in the petition, Hogan Creek is identified as a natural resource within the national wetlands inventory. The entire drainage of Hogan Creek in this area is to be developed, and any development of the subject property would fully recognize the need to protect the natural streambank and the riparian areas immediately along Hogan Creek.

(a)(4) The subject property is expressly excluded by Multnomah County from LCDC Goals 3 and 4, and the issue of retention of agricultural land is therefore inapplicable here.

(a)(5) As has been stated, the urban use proposed for the subject property would be entirely consistent with the urban uses surrounding it on three sides. In this sense, the justifications set forth above in terms of factors (1) through (3) outweigh in every respect the adverse impact of any incompatibility which might result from the proposed use. In fact, retaining agricultural use of the subject property would in itself create an adverse impact because of its incompatibility with the surrounding urban development.

(d)(2) For all the reasons set forth above, the UGB proposed by the petitioners is superior to the presently located UGB. This is the classic case in which a minor addition comprises 100 percent of all similarly situated contiguous land which could be appropriately included within the UGB. In essence, this proposal alleviates the problems created by the existing UGB, into which the subject property projects like a sore thumb.

(d)(3) The subject property comprises 5.8 acres and hence falls squarely within the acreage requirements of this subsection. Because of the small size of the property, the burden of showing differences between the suitability of the proposed UGB and the suitability of the existing UGB is less in this case than it otherwise would be.