



Multnomah County Oregon

Board of Commissioners & Agenda

connecting citizens with information and services

BOARD OF COMMISSIONERS

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Portland, Or 97214

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ANY QUESTIONS? CALL BOARD

CLERK DEB BOGSTAD @ (503) 988-3277

Email: deborah.l.bogstad@co.multnomah.or.us

INDIVIDUALS WITH DISABILITIES PLEASE
CALL THE BOARD CLERK AT (503) 988-3277,
OR MULTNOMAH COUNTY TDD PHONE
(503) 988-5040, FOR INFORMATION ON
AVAILABLE SERVICES AND ACCESSIBILITY.

MAY 8, 9 & 10, 2001

BOARD MEETINGS

FASTLOOK AGENDA ITEMS OF INTEREST

Pg. 2	9:30 a.m. & 1:30 p.m. Tuesday Budget Deliberations: AM - Central CBAC Report and DLS; PM - DSCD
Pgs 3 & 4	1:30 p.m. Wednesday Service Districts Budget Hearings and Budget Deliberations: Auditor & NOND
Pg. 5	9:30 a.m. Thursday Opportunity for Public Comment on Non-Agenda Matters
Pg. 6	10:15 a.m. Thursday Ordinance Reading
Pg. 7	10:40 a.m. Thursday Board Briefings
Pg. 7	6:00 p.m. Thursday Public Hearing & Testimony on the County Budget
Pg. 8	Updated 2001-2002 County Budget Deliberations Schedule

Thursday meetings of the Multnomah County
Board of Commissioners are cable-cast live and
taped and may be seen by Cable subscribers in
Multnomah County at the following times:

Thursday, 9:30 AM, (LIVE) Channel 30
Friday, 11:00 PM, Channel 30
Saturday, 10:00 AM, Channel 30
(Saturday Playback for East County Only)
Sunday, 11:00 AM, Channel 30
Produced through Multnomah Community
Television

Tuesday, May 8, 2001 - 9:30 AM
Multnomah Building, First Floor Commissioners Boardroom 100
501 SE Hawthorne Boulevard, Portland

AM BUDGET DELIBERATIONS

1. **CENTRAL CITIZEN BUDGET ADVISORY COMMITTEE REPORT**
Presentation by Chair M'Lou Christ

2. **DEPARTMENT OF LIBRARY SERVICES**

- I. Introduction by Ginnie Cooper, Library Director
 - II. CBAC Report by Terry McCall, Library Board Chair
 - III. Keeping our Commitment – Year 4 of the Library Levy
 - a. Expenditures & Revenues
 - b. FTE Changes
 - c. Delivering Library Services
 - ◆ Overview – how are we doing?
 - ◆ Highlights
 - Book Budget
 - Teen Initiative
 - ◆ Implementing the Plan
 - LIBROS
 - Services to Children
 - ◆ Buildings
 - IV. Issues & Challenges
 - a. The Fifth Year and Beyond
 - b. Meeting Students Needs
 - c. East County Agenda
 - V. Questions
-

Tuesday, May 8, 2001 - 1:30 PM
Multnomah Building, First Floor Commissioners Boardroom 100
501 SE Hawthorne Boulevard, Portland

PM BUDGET DELIBERATIONS

3. **DEPARTMENT OF SUSTAINABLE COMMUNITY DEVELOPMENT**

- I. Mike Oswald, DSCD Interim Director
 - Department Overview
 - Significant DSCD Activities during FY2001

- Board Resolution
 - Capital Process Resolution
 - Fleet Audit
 - Animal Control Task Force Recommendations
 - Program changes
 - II. Tom Doyle, Chair, DSCD CBAC - Presentation
 - III. FY 2002 Challenges:
 - Peter Wilcox – Assistant Director, Housing Program
 - Harold Lasley – Transportation Director
 - Dan Brown – Facilities & Property Management Director
 - IV. Board Questions
-

Wednesday, May 9, 2001 - 1:30 PM
Multnomah Building, First Floor Commissioners Boardroom 100
501 SE Hawthorne Boulevard, Portland

BUDGET HEARING

4. **SERVICE DISTRICTS** Presentation by Tom Hansell

(Recess as the Board of County Commissioners and convene as the Budget Committee for **DUNTHORPE RIVERDALE SANITARY SERVICE DISTRICT NO. 1**)

R-1 Appointment of Gay Richardson to Serve a Three Year Term as a Budget Committee Member

R-2 Appointments of Budget Committee Chair and Secretary

R-3 PUBLIC HEARING to Consider and Approve the 2001-2002 Dunthorpe Riverdale Sanitary Service District No. 1 Proposed Budget for Submittal to the Tax Supervising and Conservation Commission

(Recess as the Budget Committee for Dunthorpe Riverdale Sanitary Service District No. 1 and convene as the Budget Committee for **MID COUNTY STREET LIGHTING SERVICE DISTRICT NO. 14**)

R-4 Appointment of Paula Watari to Serve a Three Year Term as a Budget Committee Member

R-5 Appointments of Budget Committee Chair and Secretary

R-6 PUBLIC HEARING to Consider and Approve the 2001-2002 Mid County Street Lighting Service District No. 14 Proposed Budget for Submittal to the Tax Supervising and Conservation Commission

(Recess as the Budget Committee for Mid County Street Lighting Service District No. 14 and reconvene as the Board of County Commissioners)

Wednesday, May 9, 2001 - 1:40 PM
Multnomah Building, First Floor Commissioners Boardroom 100
501 SE Hawthorne Boulevard, Portland

BUDGET DELIBERATIONS

5. NON-DEPARTMENTAL

Agency	Name	Time
Non-Departmental CBAC	John Mulvey	1:40-1:55
Commission on Children, Families, and Community	Jim Clay, Commission Members	1:55-2:25
Watermaster, District 20	Juno Pandian	2:25-2:30
County Attorney	Tom Sponsler	2:30-2:40
Public Affairs Office	Gina Mattioda	2:40-2:50
Citizen Involvement Committee	John Legry, committee members	2:50-3:00
<i>Short Break</i>		<i>3:00 - 3:10</i>
Auditor's Office	Suzanne Flynn	3:10-3:20
RACC	David Hudson/Cindy Chittenden	3:20-3:25
MHRC/ONI	Amalia Alarcon-Gaddie	3:25-3:30
OSU Extension	Paul Sunderlund	3:30-3:40
Elders in Action	Becky Wehrli	3:40-3:50
Questions/follow-up items	Budget Office	3:50-4:00

Thursday, May 10, 2001 - 9:30 AM
Multnomah Building, First Floor Commissioners Boardroom 100
501 SE Hawthorne Boulevard, Portland

REGULAR MEETING

CONSENT CALENDAR - 9:30 AM

DISTRICT ATTORNEY'S OFFICE

- C-1 Amendment 5 to Intergovernmental Revenue Agreement 4600001483 with the City of Portland Police Bureau, Extending Funding for 3 FTE Deputy District Attorneys from the Portland Police Bureau Local Law Enforcement Block Grant

SHERIFF'S OFFICE

- C-2 Intergovernmental Revenue Agreement 0111028 with the United States Marshals Service, for the Housing, Safekeeping and Subsistence of Federal Prisoners at the Multnomah County Detention Center Facility

DEPARTMENT OF COMMUNITY AND FAMILY SERVICES

- C-3 Intergovernmental Revenue Agreement 0110886 with the State of Oregon Office of Medical Assistance, to Allow for Medicaid Administrative Claiming for the County's "Federal Financial Participation" Option

DEPARTMENT OF SUSTAINABLE COMMUNITY DEVELOPMENT

- C-4 Wallace Medical Concern Sublease of 120 Square Feet of Office Space and Shared Use of Exam Rooms, Reception Area and Other Common Areas within the Rockwood Neighborhood Health Access Clinic Building at 800 SE 181st Avenue

DEPARTMENT OF HEALTH

- C-5 Renewal and Amendment 1 to Intergovernmental Agreement 4600001790 with Oregon Health Sciences University, Providing Comprehensive Case Management Services for Low-Income Persons Living with HIV/AIDS

- C-6 Renewal of Intergovernmental Agreement 4600001799 with Oregon Health Sciences University, Providing Dental Services for Low-Income Persons Living with HIV/AIDS at the Russell Street Dental Clinic

REGULAR AGENDA - 9:30 AM

PUBLIC COMMENT - 9:30 AM

Opportunity for Public Comment on Non-Agenda Matters. Testimony Limited to Three Minutes Per Person.

DEPARTMENT OF SUPPORT SERVICES - 9:30 AM

- R-1 Connecting Multnomah County's Affirmative Action Plan to a Diverse Workforce. Presented by Cecilia Johnson and Staff.
- R-2 RESOLUTION Authorizing the County to Amend October 1, 1998 Lease Agreement and to Provide Funds to the Children's Land Trust, Formerly Known as the Regional Children's Campus Inc. (RCC), for Reimbursement of Certain Development Costs

SHERIFF'S OFFICE - 9:55 AM

- R-3 RESOLUTION Directing the Finance Division to Redirect Bond Money to the Wapato Project

DEPARTMENT OF HEALTH - 10:00 AM

- R-4 NOTICE OF INTENT to Apply for Grant Funding through the Substance Abuse and Mental Health Services Administration's Build Healthy Community Programs to Support the County's Behavioral Health Integration Project
- R-5 NOTICE OF INTENT to Respond to the Ryan White Care Act Title III HIV Planning and Capacity Building Grant Program Request for Proposals
- R-6 First Reading of an ORDINANCE Amending MCC §§ 21.501, 21.503 and 21.999 Relating to Smoke-Free Workplaces

AGING AND DISABILITY SERVICES DEPARTMENT - 10:25 AM

- R-7 NOTICE OF INTENT to Respond to a Request for Proposals from the Federal Office of Victims of Crime for a Crime Victims with Disabilities Coordinated Response Project Grant

DEPARTMENT OF SUSTAINABLE COMMUNITY DEVELOPMENT - 10:30 AM

- R-8 RESOLUTION Authorizing Grant of Easement to City of Portland for Public Street and Walkway [Hollywood Library Mixed-Use Project]

NON-DEPARTMENTAL - 10:35 AM

- R-9 Second Reading and Possible Adoption of an ORDINANCE Amending Multnomah County Code §§ 3.301 and 3.306 Relating to the Citizen Budget Advisory Committee (CBAC) for the Department of Aging and Disability Services
- R-10 Budget Modification CFS 49 Requesting \$10,000 from General Fund Contingency for the Brentwood-Darlington Community Center

Thursday, May 10, 2001 - 10:40 AM
(OR IMMEDIATELY FOLLOWING REGULAR AGENDA)
Multnomah Building, First Floor Commissioners Boardroom 100
501 SE Hawthorne Boulevard, Portland

BOARD BRIEFINGS

- B-1 Mental Health Risk Analysis. Presented by Dave Boyer and Jim Gaynor.
- B-2 Update on Implementation of Animal Control Task Force Recommendations. Presented by Gary Hendel.

Thursday, May 10, 2001 - 6:00 PM
Midland Branch Library, Large Meeting Room
805 SE 122nd Avenue, Portland

PUBLIC HEARING

- PH-1 Opportunity for Public Input on the 2001-2002 Multnomah County Budget. Testimony Limited to Three Minutes Per Person.

2001-2002 Multnomah County Budget Deliberations Schedule

***All sessions to be held in the Multnomah Building,
Commissioners Boardroom 100, 501 SE Hawthorne
Boulevard, except as noted***

Thur, April 26, 2001	9:30 to noon	Executive Budget Overview Presentation to Board and Regular Board Meeting
Tue, May 1, 2001	9:00 to 3:00 p.m.	Board Budget Work Session on Issues
Thur, May 3, 2001	9:30 to noon	Executive Budget Message and Board Approval of Budget for Transmission to Tax Supervising and Conservation Commission, Regular Board Meeting
Tue, May 8, 2001	9:30 to noon	Central Citizen Budget Advisory Committee Report & Department of Library Services Budget Hearing
Tue, May 8, 2001	1:30 to 4:00 p.m.	Department of Sustainable Community Development Budget Hearing
Wed, May 9, 2001	1:30 to 4:00 p.m.	Non-Departmental and Special Service Districts Budget Hearings
*Thur, May 10, 2001	6:00 to 8:00 p.m.	Public Hearing and Testimony on the Multnomah County Budget, Midland Branch Library, 805 SE 122nd Avenue, Portland
Tue, May 15, 2001	9:30 to noon	Public Affairs Office Legislative Update discussion, followed by Department of Aging and Disability Services Budget Hearing

2001-2002 Multnomah County Budget Deliberations Schedule

***All sessions to be held in the Multnomah Building,
Commissioners Boardroom 100, 501 SE Hawthorne
Boulevard, except as noted***

Tue, May 15, 2001	2:30 to 4:00 p.m.	Mental Health System Briefing
Wed, May 16, 2001	9:30 to noon	Health Department Budget Hearing
Wed, May 16, 2001	1:30 to 4:00 p.m.	Department of Community and Family Services Budget Hearing
*Thur, May 17, 2001	6:00 to 8:00 p.m.	Public Hearing and Testimony on the Multnomah County Budget, North Portland Branch Library, 512 N Killingsworth, Portland
Tue, May 22, 2001	9:30 to noon	District Attorney's Office Budget Hearing and Mental Health Council Briefing
Tue, May 22, 2001	1:30 to 4:00 p.m.	Department of Juvenile and Adult Community Justice Budget Hearing
Wed, May 23, 2001	9:30 to noon	Sheriff's Office Budget Hearing
Wed, May 23, 2001	1:30 to 3:00 p.m.	Department of Support Services Budget Hearing
*Wed, May 23, 2001	6:00 to 8:00 p.m.	Public Hearing and Testimony on the Multnomah County Budget, Gresham Branch Library, 385 NW Miller, Gresham
Tue, May 29, 2001	9:30 to noon	Capital Program Budget Hearing

2001-2002 Multnomah County Budget Deliberations Schedule
***All sessions to be in held in the Multnomah Building,**
Commissioners Boardroom 100, 501 SE Hawthorne
Boulevard, except as noted*

Tue, May 29, 2001	1:30 to 4:00 p.m.	Discussion, Follow-up Info, Review Budget Amendments Work Session
Wed, May 30, 2001	9:30 to noon	Discussion, Follow-up Info, Review Budget Amendments Work Session
Wed, May 30, 2001	1:30 to 4:00 p.m.	Discussion, Follow-up Info, Review Budget Amendments Work Session
Tue, June 5, 2001	9:30 to noon	Discussion, Follow-up Info, Review Budget Amendments Work Session
Tue, June 5, 2001	1:30 to 4:00 p.m.	Discussion, Follow-up Info, Review Budget Amendments Work Session
Wed, June 6, 2001	9:30 to noon	Discussion, Follow-up Info, Review Budget Amendments Work Session
Thur, June 7, 2001	1:30 to 3:00 p.m.	Tax Supervising and Conservation Commission Public Hearing and Testimony on Multnomah County Budget (quorum of BCC to attend)
Thur, June 7, 2001	6:00 to 8:00 p.m.	Public Hearing and Testimony on the Multnomah County Budget
Thur, June 14, 2001	9:30 to noon	Public Hearing and Testimony and Adoption of Budget and Amendments and Regular Board Meeting

CENTRAL CITIZEN BUDGET ADVISORY
COMMITTEE

and

CITIZEN BUDGET ADVISORY
COMMITTEES

**Budget Recommendations
FY 2001 - 2002
&
Dedicated Fund Review**

April 2001

Multnomah County Citizen Involvement Committee
2115 SE Morrison Street - Portland, Oregon 97214
503-988-3450

Central Citizen Budget Advisory Committee

M'lou Christ, Chair
Susan Oliver, CFS CBAC
Sandra Spiegel, Health CBAC
Jim Lasher, MSCO CBAC
Vera Robbins, MCSO CBAC
Susan Hathaway-Marxer, Library CBAC
Fran Landfair, ADS CBAC
Bill Hancock, Health CBAC

Dick Wegner, DA CBAC
Shannon Shoul, SS CBAC
John Mulvey ND CBAC
Tom Doyle, SCD CBA
Roy Chapman, ADS CBAC
Mark Jones, JACJ CBAC
Tim Farley, SCD CBAC
Doug Montgomery, Ph.D., CFS CBAC

Aging and Disability Services

Fran Landfair, CCBAC Rep. Elders in Action Commission Leadership Team
Roy Chapman, CCBAC Rep. Disability Services Advisory Council, Elders in Action Commission Leadership Team & Disability Services Advisory Council Members

Community/Family Services CBAC

Susan Oliver, CCBAC Rep. Robert Gassner, Muriel Goldman, Douglas G. Montgomery, Ph.D., Chair, CCBAC Rep. & CCFC CBAC, Winzel Hamilton

District Attorney's Office CBAC

Dick Wegner, Chair, CCBAC Rep.
Mike Greenlick, Irwin Mandel, Doug Menely, Robert Pung, Dave Simpson, Karen Burrell

Health Budget Committee

Bill Hancock, President CHC
Sandra Spiegel, Chair & CCBAC Rep.
Donna Sather, Marge Jozsa, Health Council Members

Community Justice CBAC

Mark Jones, Chair, CCBAC Rep.
Bill Hoffstetter, Charlotte Cook, Art Hendricks, Susan Cox

Library Budget Committee

Susan Hathaway-Marxer, Chair, CCBAC Rep., Paul Millius, Terri Naito, Library Board Members

Non-Departmental CBAC

John Mulvey, Chair, CCBAC Rep.
John Shoul, Helen Ellison, Ted Blasak, Robert Jones, Barrett Anderson

Sheriff's Office CBAC

Jim Lasher, Chair, CCBAC Rep.
Vera Robbins, CCBAC Rep.
Malcomb Fruend, Marv Woidyla, Juanita Crawford, George Kelley

Support Services CBAC

Shannon Shoul, Chair, CCBAC Rep.
Donald Dumont, John Bartley III, Maureen Pung, Brian Wayson

Sustainable Com. Dev. CBAC

Tom Doyle, Chair, CCBAC Rep.
Ron Thrasher, Tim Farley, CCBAC Rep., Steve Murray, Iris Newhouse, Michael Morris, D'Norgia Price

CBAC Staff: Don Carlson, Vickie Herson & Martha Murray ADS; Kathleen Todd, Central CBAC & ND; Mary Ann Stewart & Linda Grimes CFS; Tom Simpson & Scott Marcy, MCDA; Samuel Konadu, DSCDS; Sonia Manhas, MCH; Becky Cobb, LS; Pat Franck, JACJ; Larry Aab, MCSO; Janet Thompson & Paula Watari, SS

**CENTRAL CITIZEN BUDGET ADVISORY
COMMITTEE**

and

**CITIZEN BUDGET ADVISORY
COMMITTEES**

2001 - 2002

BUDGET RECOMMENDATIONS

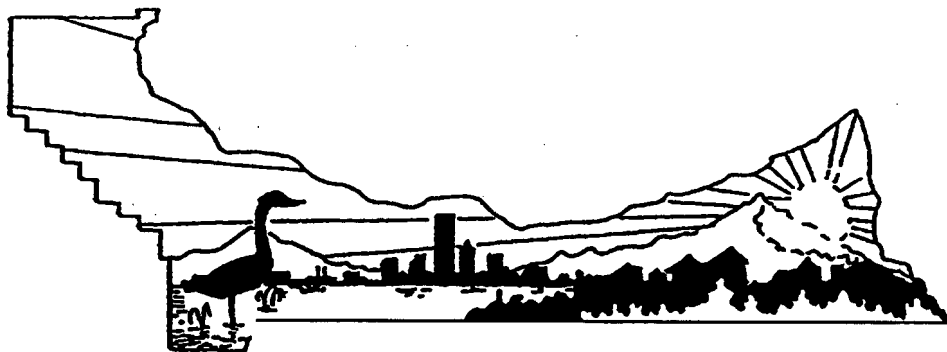


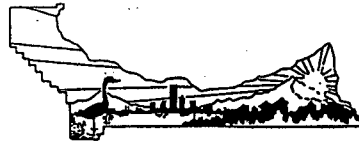
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- ◆ Department of Aging and Disability Services
- ◆ Community and Family Services & Multnomah
Commission on Children & Families CBAC
- ◆ Department of Juvenile and Adult Community Justice CBAC
- ◆ Multnomah County District Attorney's Office CBAC
- ◆ Multnomah County Health Department CBAC
- ◆ Department of Library Services CBAC
- ◆ Non-Departmental CBAC
- ◆ Multnomah County Sheriff's Office CBAC
- ◆ Department of Support Services CBAC
- ◆ Department of Sustainable Community Development CBAC
- ◆ Assessment 2000
- ◆ Dedicated Fund Review 2000 - Public Safety

2001 - 2002

Central Citizen Budget Advisory
Committee

Budget Recommendations



Citizen Involvement Committee

2115 SE MORRISON PORTLAND, OREGON 97214 503 988-3450 FAX 503 988-5674

March 23, 2001

To: Interim Chair Bill Farver
Interim Commissioner Pauline Anderson
Commissioner Serena Cruz
Commissioner Lisa Naito
Commissioner Lonnie Roberts

From: M'Lou Christ, Chair
Central Citizen Budget Advisory Committee

Re: Central CBAC 01/02 Budget Report

The Central Citizen Budget Advisory Committee (CBAC) is providing the Board of County Commissioners of Multnomah County the findings of the Department Citizen Budget Advisory Committee (CBAC) Reports. These reports utilize a consistent format, are concise, and have been well researched. This year the department CBAC reports include expanded "process, major changes, and concerns" sections. These demonstrate the depth of review and effort accompanying each attached report. The specific recommendations can be discussed in further detail at the individual department hearings to be held shortly.

With a constraint budget following on the heels of a flat budget revenue year, harder and more hurtful choices have to be made to ensure the long-term health of Multnomah County. The CBACs have responded by examining many of the critical issues carefully and formulating recommendations accordingly. All CBAC committees should be applauded for their effort.

As in previous years, the Central CBAC continues to support budgets that place emphasis on the following significant factors:

Co-location of Services: Placing multiple community-based services in a common location enhances access by the public. This approach improves service delivery as well as community support and understanding of County-funded programs.

Infrastructure Preservation: Protecting County infrastructure by providing sufficient capital investment is a sound fiscal policy. This minimizes future costs, protects citizens' investments, and ensures that County properties retain their program and financial value.

Improving the Balance of Prevention and Diversion Services: To load the justice system in one area or make cuts in another can bring unforeseen imbalances in future years. The Central CBAC continues to support diversion and follow-up/monitoring programs because they provide cost savings by reducing arrests and diverting individuals from County defense, prosecution, and incarceration resources. Therefore, we are very concerned about the drastic reduction in Juvenile

Justice, especially the cutbacks in and loss of several excellent early intervention programs, and the loss of FTEs in the District Attorney's Office. We are also not convinced that the number and type of jail beds in existence and on-line will match future needs or leasing (income) possibilities.

Issues of particular concern in this budget include the following list:

Budget-reduction Methodology: Especially in times of constraint budgets the County should concentrate on what it does well and fund accordingly. Across-the-board cuts fail to recognize the differences between programs, offices, and departments and it impacts the smaller of these disproportionately. After several years of such uniform cost-reduction methodology there's little fat in any programs; we're now cutting to the bone in many General Fund-dependent critical areas. It's time to prioritize which services or portions thereof:

- are mandated.
- best serve our primary benchmarks and our most vulnerable populations.
- are getting best results.
- leverage outside funding.
- promote future savings or revenues.
- continue to receive matching funds from partnering jurisdictions/agencies.
- are/can be/or should be provided by another agency or jurisdiction.

The County will undoubtedly have to stop funding some programs in order to continue those that meet higher priorities.

Revenue Projections/ Energy Cost Increases: Based on the past, we believe the current Business Income Tax projections are too optimistic and should be projected at a lower level. Likewise, we are concerned that energy cost increases will exceed current allowances.

Rainy Day Fund: The County should continue banking toward its targeted Rainy Day Fund, especially before creating new programs that will require on-going funding—unless they replace a program of lower priority or productivity.

Impacts on Morale: Staff throughout the County look to the Commissioners' Offices to match their departments' reduction compliance. This is especially true this year, when departments have deleted training and merit increases and slashed various support services and supplies. Individual and co-located Commissioner cutbacks do not appear to have met current budget cutback requirements and we feel this will add to the morale impact on other General Fund staff. We also believe communication and awareness would be improved if the Commissioners were more directly familiar with departments, as in the past when each Commissioner served as a liaison to the Board for specific departments.

Potential Revenue Enhancement Opportunities for this and future budget cycles:

Seek Uncollected and Potential Funds: The following are our suggestions (County employees may know of others):

- Implement an aggressive effort to collect fines and judgements that are owing to the prevailing parties and the County;

- Strengthen efforts to enact the guidelines for Federal Title 19 funding (This will greatly benefit the Departments of Health, Community Justice, and Children and Family Services);
- Charge back to the State of Oregon any un-funded mandates, beginning with the cost difference due to Senate Bill 1145;
- Institute the Sheriff's revenue generating proposals, such as bed fees to those who can afford to pay;
- Increase fees where possible to cover service costs;
- Collect administrative overhead on Federal dollars wherever possible;
- Provide grant-writing expertise as needed to capture potential funds for worthy County programs;
- Continue to press for reimbursement of funding lost due to Urban Renewal Districts;
- Determine Commissioner/Department opportunities to attract new business to the County and assist existing businesses that need to expand/relocate within the County. (Call Columbia Sportswear and seek a decision on what support is necessary to remain in Multnomah County.)

Establish More Links within County-backed Services: To fill gaps left by cutting services and programs that impact our most fragile and vulnerable population, additional links should be established between Community Justice, the Health Department, Department of Children and Family Services, Commission on Children, Families and Community, Caring Communities, the Library's Web Camp, the SUN School programs, the Citizen Involvement Committee, and others.

Cost-Benefit Analysis: A cost-benefit analysis should be commenced to determine if there are any savings to be gained in the consolidation of the Commission on Children, Families and Community with other programs. Absent those results, freeze any further effort on this proposed consolidation.

Emerging Issues and Opportunities to Impact County Service Delivery:

Experienced Workforce Shortfall: Recruitment and retention needs will escalate sharply in the near future due to imminent retirement eligibility of many County employees. Cross-agency or centralized strategies need to be put in place now to minimize the effects of these losses everywhere.

IT Experience Shortfall: Likewise, cutbacks and private sector competition threaten the viability of County IT services. Strategies need to be put in place now to minimize the effects of these losses.

Interns: The County should expand its efforts to have local high school, college, and university students serve as interns. This not only provides self-esteem, awareness of County services and work experience for students, it will provide the County with immediate assistance and potential County employees in the near future. Publicize these successful efforts.

Centralization and Optimization: There is a need to take a look at streamlining internal services in the light of consistency and equity. We look forward to the results of this recently ordered analysis.

Toot Our Horn: The County continues to be a somewhat invisible government. There is a compelling need to publicize our community resources, our programs, our citizen-involvement opportunities, and our successes. This can be accomplished through the Public Affairs Office and better utilization of in-house links to the community, such as the Library and Citizen Involvement Committee (CIC) publications, brown-bag events with employees, the media, and the elected officials on success in the County.

Finally, please note that the Budget & Quality Office report on the progress status of all CBAC Recommendations made in the FY 00/01 Budget is included next to the tab labeled Assessment 2000. At this time we would like to thank the department representatives and the Citizen Involvement Committee staff. Their time, efforts, and enthusiasm contribute greatly to a successful budget process for Multnomah County and its citizens.

Central Citizen Budget Advisory Committee:

M'Lou Christ, Chair, Central CBAC
Susan Oliver, Department of Community & Family Services CBAC
Sandra Spiegel, Department of Health Services CBAC
Bill Hancock, Department of Health Services CBAC
Vera Robbins, Sheriff's Office CBAC
Jim Lasher, Sheriff's Office CBAC
Dick Wegner, District Attorney's CBAC
Susan Hathaway-Marxer, Library CBAC
Mark Jones, Department of Juvenile & Adult Community Justice CBAC
John Mulvey, Non-Departmental CBAC
Tom Doyle, Department of Sustainable Community Development CBAC
Tim Farley, Department of Sustainable Community Development CBAC
Shannon Shoul, Department of Support Services CBAC
Fran Landfair, Department of Aging & Disability Services CBAC
Roy Chapman, Department of Aging & Disability Services CBAC
Douglas G. Montgomery, Ph.D., Department of Community & Family Services CBAC &
Commission on Children, Families, and Community CBAC
Kathleen Todd, Citizen Involvement Committee Staff

Citizen Budget Advisory Committee

for the

Department of
Aging and Disability Services

**Citizens Budget Advisory Committee Report on
Multnomah County Aging and Disability Services
March 15, 2001**

Jointly submitted by
Elders in Action Commission Leadership Team and
Disability Services Advisory Council

Process:

The budget review process extended over a several month period. The two groups (Elders in Action Commission Leadership Team and DSAC) met independently of one another, but were given the same materials and had opportunities to interview the same individuals.

Each member of the CBAC was given a copy of the Aging and Disability Service (ADS) adopted budget for FY 2000-2001 to read. In addition, they were provided with the attached documents:

- Exhibit A -- FY 2002 Budget Assumptions (November 15, 2000)
- Exhibit B -- Report for December 2000 Meetings memo from Jim McConnell, with attachments describing the Governor's proposed budget (December 6, 2000)
- Exhibit C -- Budget Briefing memo from Jim McConnell, detailing ADS revenue assumptions and expenditure assumptions, and reorganization plans for both ADS and the state Department of Human Services (December 6, 2000)
- Exhibit D -- Memo describing the program cuts outlined in the Governor's budget and the budget environment (January 17, 2001)
- Exhibit E -- Aging and Disability Services FY 02 Budget Summary Prepared for the DSAC and EIAC (February 21, 2001)
- Exhibit F -- Memo from Jim McConnell updating EIA, DSAC and ADS staff on the ADS FY 2001-02 Budget Request (March 6, 2001)

The above materials were discussed with the CBAC members by Jim McConnell, ADS Director and/or Don Carlson, ADS Business Services Manager. CBAC members were given the opportunity to interview both individuals on more than one occasion, and were encouraged to ask questions and make suggestions.

Major Changes:

The majority (approximately 82%) of ADS funding comes through the state Department of Human Services' Senior and Disabled Services Division budget. In his proposed budget, the Governor has recommended cuts that would result in the following impact on the ADS budget:

- Elimination of Oregon Project Independence (entire program)
- Elimination of long-term care services to Medicaid clients in survival levels 15-17
- No new staff to offset caseload growth

However, since the state budget is not finalized until the Legislature has approved it, there are still no final answers on what changes may ultimately be made to the ADS state revenues. For instance, the leadership of the Legislature has supported restoring half of the funding for Oregon Project Independence. More recently, the Governor has issued a revised budget which restores funding of long term care services to Medicaid clients in survival levels 15-17 and restores OPI to the 50% level. The Speaker of the House and other legislators has announced an intention to restore all services currently provided by SDSD. The ADS budget plans for 50% of the current OPI program.

In addition, the County has ordered ADS to reduce its County General Fund budget by 4.6% in FY 2001-2002, totaling

\$300,000. While this may not seem large compared to other departments, ADS uses about half of its County General Fund money as match for additional Title XIX Medicaid funds.

In order to balance the budget in light of these revenue reductions and to plan for a 3% COLA, ADS reduced staffing levels by 14.5 full-time equivalent positions. Four are in Central Office and 10.5 are spread among field offices. However, some of these positions may be restored depending upon the final state budget.

CBAC Recommendation: The CBAC supports a current service level budget, and opposes cuts to programs and staff positions for the following reasons:

- Cuts in field positions (case managers and related support staff) mean an increase in caseloads that are already too high. This reduces attention to at risk clients and is a danger to their safety and security.
- Reductions in OPI will threaten the independent living of almost 500 seniors. These cuts also reduce case management at the District Senior Centers.
- The issue of caseload growth in both elderly and disability populations without additional staff support puts the lives of people in jeopardy. It also raises the question of whether the system has the capacity to meet demand and expectations.

Add/Cut Packages:

Proposed cuts have been described in Major Changes, above.

Elders in Action Commission Leadership Team and DSAC have each proposed add packages. It has been the practice in past years for the two groups to meet together to prioritize the add packages. This step is planned for April 4th, after the due date for

this report. The add packages, therefore, are described here, but not prioritized.

- Funding for Community Use programs at the new East County Building -- Interdepartmental with Health: ADS and Health are building a new facility in Gresham due to open in fall 2001. Included in the design is space for use by various community groups. This add package is for approximately \$220,000 which would provide staffing for central reception, scheduling and oversight of the space, plus security guards for after-hours room use.
- Funding for Additional Public Guardian Staff -- Interdepartmental with Community and Family Services: CFS will be receiving an infusion of new funding for improvement of mental health services. The ADS Public Guardian program currently must turn away many individuals in need of guardianship/conservatorship programs, a high percentage of whom have been diagnosed with severe and persistent mental illness. This add package is for approximately \$115,00. It would fund 2.0 FTE additional staff to serve 50 more individuals who have mental health problems.
- Funding to cover shortfalls in Oregon Project Independence (OPI): OPI provides case management and in-home services to seniors age 60 and older who are not Medicaid eligible and need assistance in order to remain in their own homes. The services are provided on a sliding-fee scale. This add package would restore approximately \$590,000 for full funding of the program.



MULTNOMAH COUNTY OREGON

AGING AND DISABILITY SERVICES
AREA AGENCY ON AGING
421 S.W. 5TH, 3RD FLOOR
PORTLAND, OREGON 97204
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TTY: 988-3683 FAX: 988-3656

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FY 2002 Budget Assumptions

November 15, 2000

General Assumption:

The ADS FY 2000 will attempt to maintain all programs at the current level.

Revenue Assumptions:

All revenues will remain flat except the following:

- 2% caseload increase in base Medicaid (Title XIX)
- No increase in OPI (Oregon Project Independence).
- No increase in County General Funds.
- 2% increase in City of Portland base, plus increase of Senior Center Development funding from \$125,000 to \$250,000.
- Title XIX will be at 49% of the biennium allocation.

Expenditure Assumptions:

Personnel

- All ADS positions, will include a 3% increase for COLA and benefits.
- An unspecified increase for the PERS bond costs.

Contracts:

- No increase
- Living wage issue (undetermined at this time)

Direct Materials & Services:

- 1.5% increase in total cost except contracts and County supplement (match)

Internal Service Reimbursements:

- Unspecified increase for MERLIN (new County fiscal management program)
- Pay 50% of computer flat fee because the State is providing laptop computers for Medicaid case managers
- Increased facilities cost for:
 - West Aging Services Branch
 - West Disability Services Branch
 - Central Office



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Memo:

**To: Jan Campbell, Chair
Multnomah County DSAC
Frances Johnson, Chair
Elders-in-Action Commission**

From: Jim McConnell, ADS Director

Date: December 6, 2000

Re: Report for December 2000 meetings

1. Governor's 2001-03 Budget.

Following are some highlights of Governor Kitzhaber's proposed budget of \$12.022 billion:

a) New priorities:

- **Education – new funding (\$5.43 billion) for K-12. (No increases for Higher Education).**
- **The Oregon Children's Plan - \$66 million for services to preschool children and their families.**
- **Rural investments – new investments in infrastructure**
- **Oregon Health Plan – maintain the current program**

b) Cuts: The budget proposes significant cuts in current services, particularly in Human Services. The cuts will pay for the new priorities, settlement of 2 lawsuits, reductions in federal funding, 60% increase in prescription drug costs, and a \$159 million tax cut from passage of Measure 88.

A summary of the significant cuts in Human Services is attached.

c) Impact on Seniors and Disability Services includes:

- **Eliminate the Oregon Project Independence (OPI) Program (3000 Senior clients/\$13.7million in General Funds)**

- Eliminate Medicaid Long Term Services clients in levels 15 through 17
- Increase licensing fees for some Long Term Services providers
- Continue the Medicare Upper Limit financing (for Hospitals and Nursing Facilities)
- Cuts in basic rates for Community-based Services providers
- Cut 37 staff positions (Administrative and Case Management)
- Increase funds recovered from estates of former clients.

The State Legislature is required to approve a State budget for the Biennium beginning July 1, 2001.

2. ADS Budget FY 2001-02

There are two attachments for this item. One is a revised version of the ADS Planning Assumptions for revenues and expenditures. The other is a list of unmet needs/program improvements that we will prioritize with DSAC and EIA for presentation to funding sources. We are asking the DSAC and EIA to comment on both documents. At the January meetings, we will be recommending priorities for both the ADS Base Budget and the "ADD packages".

3. Status on ADS Reorganization.

- a) ADS has hired Nancy Harp as the Program Manager for the Community Services Program. Nancy comes to ADS from Providence Health Systems where she was manager of the Regional Cancer Counseling Program. We are very pleased that Nancy has agreed to join ADS. She replaces Bob Leverenz who retired at the end of August.
- b) ADS is in the process of interviewing for the new District Manager positions in East County, Mid-County, and West Offices.
- c) ADS has announced the vacancy for the Long Term Services Manager. This position will oversee the District operations for both Aging and Disability programs of ADS.

4. State Department of Human Services Reorganization. (See an attachment regarding the proposed reorganization). The plan for reorganizing is on a fast track, with very limited opportunity for review and comment from outside DHS. The attachment attempts to identify what we would expect from any reorganization that affects services to Seniors and persons with disabilities. Please review and give us input. We have no real information at this time about what the reorganization will look like. The DHS Director expects to present a plan to the Governor by January 26.

cc: ADS Managers

Major Budget Changes for 2001-03

Department Wide Changes

- The Department will realize \$4 million (GF) in savings by reorganizing to make operations more integrated, efficient and effective, and more individually-tailored to client needs.
- Budgets for caseload and cost-per-case growth are based on more conservative budget forecast assumptions than in the past. This will produce a \$22.8 million savings in caseload driven programs.
- Elimination of selected inflation increases including substitute homes for the elderly and disabled; TANF cash grants; Employment Related Day Care; Office of Medical Assistance Programs (OMAP) fee-for-service; alcohol and drug treatment; selected mental health and SCF programs.

Adult and Family Services

- Overall reduction in the JOBS program of 16% from CSL, and 35% from 1999-01 service level. This reduction includes elimination of JOBS retention services and JOBS Plus. An estimated 5,000 clients will not receive job retention services through AFS, but will be able to access similar services through Workforce Investment Act "One Stop" employment centers. Approximately 500 clients will be affected by the elimination of JOBS PLUS.
- Reversal of March 2000 daycare policy changes. This will lower the maximum income eligibility standard from 185% of the FPL to 160% and reduce the amount of child care subsidy available for those remaining eligible. It is expected that the number of families receiving Employment Related Day Care will return to pre-March levels. This means that the caseload will decline from approximately 12,800 families (25,800 children) to 10,800 families (22,500 children).
- Reduction of maximum age (except in special cases) for child care assistance from age 13 to 12 will save \$5.2 million (GF). Some children with a mental health diagnosis or behaviors that indicate a greater need for supervision, over the age of 12 will continue to be served. Approximately 500 children will be affected monthly.

- Reduction in TANF grants – e.g. \$5 per month for a household of three from \$460 to \$455 saves \$3.1 million GF. This reduction is expected to affect 14,300 families in the biennium.
- Eliminate 124 positions in both central administration and field staff (\$6.1 GF, \$11.1 TF)
- Replacement of \$14 million General Fund with \$14 million of federal Child Care Development resources

State Office for Services to Children and Families

- Reduce the System of Care program by 34 percent and delay implementation of the final phase by nine months (\$7.7 million GF).
- Elimination of special programs including the Mental Health Partners in Multnomah county, Friends of the Children, and the Father Taaffe Foundation funds (\$.7 million GF).
- Restructuring of the field administration and field support and technical assistance including the elimination of 29 non-case-carrying positions (\$1.3 million GF).
- Replacement of General Fund with federal resources through greater use of Medicaid funded Targeted Case Management (\$10.3 million GF).
- Reduction in various programs including threat of harm, family support team “flex funds”, and contracted family treatment and support (\$.9 million GF)

Health Division

- Elimination of General Fund (\$2.5 million) for 20 school-based health clinics, in 11 counties throughout the state. In the 1998-99 school year, these clinics served approximately 18,171 clients.
- Elimination of the child fatality review program (\$.7 GF) which collects, maintains and provides data analysis for 36 local review teams and the

statewide team. The local and statewide teams use these data to design local strategies to reduce child fatalities.

- Elimination of selected perinatal and prenatal programs and the Multnomah County "Teen Info" health line (\$.5 million GF). The "Teen Info" health line provides health information for more than 4,000 teens each year. Perinatal medical consultation and continuing education for health care providers statewide and migrant community health centers.
- Increase of \$7 million in Tobacco Settlement resources to increase anti-smoking relation education and prevention efforts
- Additional resources of \$500,000 General Fund to develop a minority health database.
- Transfer of Babies First resources to the Commission for Children and Families for the "Oregon Children's Plan" (\$1.4 million GF).

Mental Health and Developmental Disabilities Services Division

- Additional General Fund resources (\$43 million) to provide greater access to services for the DD population. Funds will provide additional in-home supports, limited comprehensive services (24 hour) and crisis services. This initiative is partially in response to the Staley v. Kitzhaber lawsuit.
- Additional funds for the State Hospital to meet federal requirements for increased monitoring and training of staff relating to seclusion and restraint issues. Also there are new resources to better control the spread of infectious disease including Hepatitis C. (\$4.7 million GF)
- The "Oregon Children's Plan" (0-8 initiative) adds \$3.5 million General Fund for mental health services for children up to age 8 and their parents.
- Community based services are funded including community residential and wrap around services are funded to move children into more appropriate and effective care settings. This plan includes closing a 20-bed children's ward at the state hospital (\$4.0 GF).

Senior and Disabled Services Division

- Eliminate the Oregon Project Independence (OPI) program which provides assistance to 3,738 low-income seniors, for in-home services (\$13.7 million GF).
- The Medicaid long-term care program for low-income seniors and disabled persons is reduced by \$9.6 million GF by eliminating services for over 3,800 clients in Levels 15 through 17. An adjustment for those returning to the program at a future date as they become eligible has been factored into this reduction. Corresponding reductions were taken in MHDDSD (\$.6 million GF) and OMAP (\$2.5 million GF).
- A restructuring of the rate structure for Assisted Living Facilities, Residential Care Facilities, Client Employed Provider/Hourly, and Adult Foster Homes is included in the budget. The rate restructuring will result in a \$6.1 million GF savings.
- A number of smaller programs are eliminated including mental health projects, chronic care projects, and the senior volunteer program resulting in a \$.4 million GF saving.
- A savings of \$5 million General Fund from staff reductions in both the central office and the field are part of the budget. This will result in elimination of 37 positions.

Vocational Rehabilitation Division

- Elimination of the Sheltered Services Program will result in the loss part-time employment for more than 218 severely disabled clients (\$1.6 million GF).

Office of Medical Assistance Programs

- The budget assumes the continuation of the 10 cent surcharge on tobacco products. Without this \$36 million or revenue, OMAP will have to eliminate the CHIP program (19,700 clients), the PLM women program for women

between 130% and 170% of the poverty level, OHP coverage for roughly 1,700 students and about one-third of the Medically Needy program.

- Type B hospitals payments were reduced from \$8.6 million to \$2.0 million GF.
- Type B hospitals are hospitals with 50 or fewer beds that are less than 30 miles from another hospital. A plan will be developed to distribute these funds.
- The budget also assumes management actions to address the growth in drug costs for a savings of \$7 million GF. Management actions include: case management of anti-depressant therapies; reducing fee-for-service rates to commercial levels; and, implementation of a tiered co-payment program for fee-for-service clients.
- An additional 16 positions are funded to process and pay the growing number of fee-for-service claims.

Office of Alcohol and Drug Abuse Programs

- The expansion from the current biennium is fully funded including the residential rate increase (\$9.2 million GF).
- An additional \$10.5 million General Fund is included for the "Oregon Children's Plan" which provides services for children up to age 8 and their parents. This share of the Plan represents the estimated costs of the necessary alcohol and drug treatment services.

Department-wide Support Services

- Resources for the continuation of the Medical Management Information System (MMIS) project and the development of a county contracts information and payment system are part of the budget (\$4.3 million).
- There are staffing reductions in the Community Partnership Team (8 positions) which will impact both the Volunteer program and the community development program. In addition, elimination of the JOBS Plus will reduce the office staff of the CPT. Nearly 18,000 DHS clients will experience loss of support services, such as transportation, and work experience opportunities.



MULTNOMAH COUNTY OREGON

AGING AND DISABILITY SERVICES**AREA AGENCY ON AGING****421 S.W. 5TH, 3RD FLOOR****PORTLAND, OREGON 97204****HELPLINE: (503) 988-3646 ADMINISTRATION: (503) 988-3620****TTY: (503) 988-3683 FAX: (503) 988-3656****BOARD OF COUNTY COMMISSIONERS****BEVERLY STEIN • CHAIR OF THE BOARD****DIANE LINN • DISTRICT 1 COMMISSIONER****SERENA CRUZ • DISTRICT 2 COMMISSIONER****LISA NAITO • DISTRICT 3 COMMISSIONER****SHARRON KELLEY • DISTRICT 4 COMMISSIONER**

Date: December 6, 2000

To: Central Budget Office

From: Jim McConnell

Re: December 6, 2000 Budget Briefing

a) ADS budget planning for 2001-02

Because of the bleak revenue out look the Department will be challenged to maintain existing programs at the current service level. Our major revenue and expenditure assumptions are provided below.

REVENUE ASSUMPTIONS

Multnomah County. County General Fund revenues will be about the same as the current year. Projected General Fund expenditures are expected to grow about 3.6% thus creating a shortfall of approximately \$8.0 million. To meet this shortfall, the County expects that there will be a 3.6 % decrease in each department's General Fund constraint. For ADS the current GF Constraint is approximately \$6.3 million. Thus ADS would get a reduction of \$227K.

City of Portland. The City adopted a 2-year budget – so we expect to have the same amount (adjusted for inflation @ 2% or approximately \$400K) for the regular allocation. In addition, the City authorized \$125K in the current year (a 6 months allocation) for Senior District Center non-social service programs. We expect this amount to be a full years allocation of \$250K next fiscal year.

Federal Older Americans Act. Funds from the OAA are expected to increase slightly. However, since Congress has not yet approved funding for

the current fiscal year, it is difficult to project for next year. ADS will assume about a 1% increase in OAA funding for planning purposes.

State of Oregon. The Governor's office is projecting a shortfall of \$700 million in State General Funds for on-going programs for the 2001-03 Biennium. A synopsis of the Governor's Proposed 2001-2003 Department of Human Resources / Senior and Disabled Services Division Budget is attached as Exhibit A. Our best estimate of the revenue and other impacts for ADS are as follows:

- Reduction in Provider rates. These are the payments made to Client-employed providers, Home Care Agencies, Adult Foster Homes, etc. These payments are made directly by the State and are not part of the ADS Budget.
- Reduction in SDDS administration. ADS will probably receive proportionate cuts in the SDDS allocation. This could result in a loss of up to 10 case management positions at ADS.
- Elimination of Oregon Project Independence program for seniors. ADS would lose about \$1 million per year for Home care, Personal Care etc. for elderly who do not qualify for Medicaid services. Some of these funds are passed through to the Senior District Centers.
- Elimination of the General Assistance program for persons with disabilities. Along with the loss of benefits for clients, ADS could lose some staff positions.
- Reduction in Medicaid Long Term Care caseloads (2500 cases?). Again, ADS would lose a proportionate number of Case Manager positions if caseloads are reduced.
- Increased Medicaid allocation for caseload growth.

We will not have final figures from the State until after the Legislative Session ends in June/July 2001.

EXPENDITURE ASSUMPTIONS

Personal Services. We are projecting a 3.5% increase in costs for all ADS positions. This includes a COLA and benefit increases. It does not include any increase in PERS costs. At 3.5% the ADS Personal Services costs would increase by approximately \$725K.

Direct Materials and Services. We are projecting a 1.5% increase in Direct M & S costs (does not include and Contractual Services costs). At 1.5% the ADS Direct M & S costs would increase by approximately \$23K.

Contractual Services. We are projecting contractual services to remain the same. This includes pass-through contracts to our system partners (Senior District Centers, In-Home Service providers, etc.). An exception to this is the increase pass-through of the City of Portland funds to the Senior District Centers. The impact of the Living Wage issue has not been included in this assumption, since it is undetermined at this time.

Internal Service Reimbursements. We are projecting several increases in our IRS's. Major increases are likely to reflect the full year operation of the new Merlin system, as well as increases in Facility Management costs for the West Aging Office, the West Disability Office and our Central Office. Each time we renegotiate a new lease or move and office location our costs increase. A possible reduction in an ISR, may be our contribution to the PC Flat Fee Fund. The State is providing approximately 200 new laptops with docking stations, monitors and key boards for all our case managers. These will be new machines guaranteed by the State. As you know, we already have a substantial positive balance in this fund and we probably will not need to make substantial contributions next year.

b) Changes at the State Department of Human Services (DHS)

The DHS Director, Gary Weeks, has announced that the Department will "streamline" its operations in efforts to economize and improve coordination of services.

Planning for the DHS reorganization is on a fast track. The proposal will be included in the Governor's proposed budget, which is due for publication in December 2000.

The planning will address the State contracts with the Area Agencies on Aging, but no details have been released yet. Details are being developed in DHS planning sessions, and will be available shortly.

c) ADS Reorganization Update

ADS is moving ahead with plans to reorganize portions of the Department. The reorganization is to better integrate the Aging and Disability programs at ADS. This is the next step to follow up on the transfer of the Disability program from the State to Multnomah County ADS that occurred over two years ago.

The key areas in the reorganization are:

- Integration of the Aging and Disability Services sections under a **single Operations Manager (Deputy Director)**
- **Creation of single "District manager" positions** to replace the 2 Branch manager arrangement that currently exists in each of 4 Districts. ADS has separate Branch offices for Aging and Disabilities in each of 4 geographic districts. Aging has a 5th Branch in East County – The Disability program currently serves East County from its Mid-County Office.

The District Manager approach will be phased in over time. A planning Team will meet on Friday Nov. 3 to develop more details and a timeline for full implementation.

- **Creation of a Protective Services Unit.** ADS wants to focus more attention and program development on Protective Services and all of the issues of abuse, neglect, domestic violence, etc. on persons with disabilities and the elderly. ADS will assign a full time manager and staff to develop and implement improvements to the ADS program. In order to create the Protective Services Unit without new staff or resources, ADS will shift some management resources from the current Nursing Facility unit. The Nursing Facility Case managers will stay together; they will be assigned to one of the District Offices.

d) Reauthorization of the Older Americans Act. After delaying it for 6 years, Congress has finally approved reauthorization of the Older Americans Act. The Senate vote was 94-0. The House vote was 405-2. Now Congress must pass a budget for Human Services which contains funding for the Older Americans Act. The Act authorizes funding for a new category - support for Family Caregivers. But Congress has to appropriate the funds in the budget. The amount is small (\$125 million per year), but it is a first step in Federal recognition of the role of Family caregivers in the Long Term Care continuum.

Human Resources

DEPARTMENT OF HUMAN SERVICES
SENIOR AND DISABLED SERVICES DIVISION

	1997-99 Actuals	1999-2001 Legislatively Approved	2001-03 Current Service Level	2001-03 Governor's Recommended
General Fund	\$361,464,081	\$447,160,541	\$485,244,903	\$472,265,494
Lottery Funds	0	0	0	0
Other Funds	59,187,474	81,223,639	65,684,024	--84,604,156
Federal Funds	572,948,441	699,575,841	704,533,551	733,903,753
Other Funds (Nonlimited)	0	0	0	0
Federal Funds (Nonlimited)	0	0	0	0
Total Funds	\$993,599,996	\$1,227,960,021	\$1,225,462,478	\$1,290,773,403
Positions	782	917	1,104	1,046
Full-time Equivalent	740.98	845.07	1,040.11	988.94

Overview

The Department of Human Services (DHS) Senior and Disabled Services Division (SDSD) has five main programs. First, it assists clients with the costs of long-term care. Second, it provides cash assistance to people with long-term disabilities. Third, it regulates the long-term care industry. Fourth, it provides statewide protective services. Finally, it administers federal Older Americans Act programs. Older Americans Act programs include case management, outreach, referral, transportation, and nutrition services.

Case management is provided by a combination of state staff and local Area Agencies on Aging (AAA). The programs within SDSD are among the fastest growing in the state budget. This growth is driven by the increasing number of elderly and disabled citizens who are federally entitled to long-term care.

Recommended Budget

The Governor's recommended budget for SDSD is \$472,265,494 General Fund and \$1,290,773,403 total funds. This is a 5.6 percent General Fund and 5.1 percent total funds increase to the 1999-2001 Legislatively Approved Budget (LAB). The budget includes caseload growth in SDSD's long-term care programs. This growth is focused within community-based care. Nursing facility costs continue to decline. The budget also includes the following General Fund cost reductions:

Estate Collections. The budget proposes to increase the agency's recoveries from the estates of former clients. Under state and federal law, SDSD is able to collect the costs of public assistance from the estates of deceased clients. These Other Funds are used to maintain the existing programs.

**ADS 2001-02 Budget Planning
Projects for ADD Packages
12/6/00 Draft #2**

Project	Funding	Source	ADS Rating	EIA Rating	DSAC Rating	Comments
East County New Building -building coordinator -central reception -volunteer coordinator -security	\$230,000	County				
Public Guardian	\$40,000	County plus match				Total with State funding \$75,000; caseload growth
Special Needs Transportation		State				
Home Care Workers		State				
Home Care Commission		State				
Mental Health redesign and services		County and State				
Prescription drug coverage		State				
OPI-type services for persons with disabilities		State				

Multnomah County

Perspective on State DHS Reorganization

The State Department of Human Services is proposing to reorganize its systems and programs. The purpose is:

To achieve better community and client outcomes

To improve collaboration, integration, and shared responsibility within the DHS

To develop a more functional and integrated management and service delivery system

Some assumptions:

DHS:

Deliver a report to the Governor by January 26

This is not a plan to "devolve" State programs to local governments

This is not a plan to change the relationships/partnerships with local governments

The State will not give "child welfare" to the Counties.

"Stakeholders" can participate in planning work groups.

"Stakeholders" can send ideas to Bobby Mink, Deputy Director at DHS

9 "Direct Reports" will be reduced to 3 or 4.

The new system will not have "generalist Case Managers"

It will have generalists to do intake/eligibility

The system will have a single Case Plan for each client

There will be Specialist Case Managers

DHS will not tell the Developmental Disability programs that they have to become part of the AAA/SDSD network

The reorg. will not jeopardize funding sources

The system is open to change and innovation

The Governor wants the reorganization

The Governor wants the AAA network options "simplified"

Save \$4 million by reorganizing

Lay-offs are expected to be minimal, but there will be reductions in staff positions.

Themes to look for in a successful reorganization:

1. Client-focused:

- Do no harm to clients and the systems that currently work well for them
- Maintain/ improve Single Entry/Easy Access for a client for eligibility, Case Management, programs and services
- Maintain/improve coordination of services in any community regardless of funding source or Provider
- Maintain appropriate specialization for defined client groups with special needs
- Maintain client advocacy as a primary principle in all reorganization of field services

2. Partnership Framework:

- Enable local communities to better serve and support clients
- Maximize partnerships with local governments
- Provide incentives to Local Governments to partner and share responsibility for serving clients
- Do not jeopardize use of local Government resources that add quality, matching funds, preventive activities, etc.

- Give local Government the option/right of first refusal to operate a coordinated program at the community level
- Coordinate all DHS programs and services with local plans and service systems e.g. for kids who are in and out of Foster care, the County and the State must have a coordinated system.
- Recognize that local Government preventive care reduces State costs/improves quality of State services
- Forced integration within DHS will not jeopardize other local integration efforts

3. Resources:

- Maximize resources from any source, Federal, State, Local, private
- Reduce duplication of Administration by partnering with other community programs
- Partner with local programs to maximize impact of resources and improve services
- Maintain a sufficient number of "systems-builders" (usually middle manager" level) to assure continuous improvement in the systems.

Proposed Cuts for Aging and Disability Services**1/17/2001****Senior and Disabled Services Division (SDSD) Budget**

The Governor's recommended budget for SDSD is about \$472 million General Fund and \$1.3 billion total funds. This is an increase of more than 5% in dollars compared to the 1999-2001 Legislatively Approved Budget (LAB), but a 2.7% cut in services.

Budget Cuts

- Eliminate the Oregon Project Independence Program (3,783 clients/\$13.7 million);
- Eliminate long term care services for clients in level 15 through 17 (\$9.6 million);
- Restructure Community Based Care provider rates (\$15.8 million total/\$6.4 million in General Fund)

Budget Environment

- Growth in the elderly population over the age of 75, and in the number of persons of all ages with disabilities is expected to increase the demand for services in all SDSD programs.
- The legislative mandate to focus services in clients' communities and homes, and the lower cost of those services compared to institutionalization will continue to drive the demand for community based care.
- Concern about the vulnerability of clients and quality of services are challenged by the proposed reduction in provider rates.

Oregon Project Independence (OPI)

OPI is a program of in-home services designed for people who do not qualify for Medicaid but are low-income and need services to prevent premature institutionalization. On average, clients who receive OPI services are as frail as those qualifying for Medicaid.

Meet Arlene; a typical OPI recipient. She's 80, lives alone in Portland, uses a wheelchair and receives chemotherapy for cancer. She receives \$800 per month in Social Security benefits. She receives three hours of in-home care per week. She needs at least twice that much. But those three hours of help buy Arlene the independence, and dignity that she, like so many other seniors, cherishes.

How about Alice? Alice is legally blind, and a diabetic. She lives alone in a studio apartment. Should she move to a nursing home? What about Kathryn? She's 75, has severe arthritis, lives alone, and would probably injure herself trying to meet her in-home care needs by herself.

Here are the facts:

- There are 3,738 people like Arlene, Alice and Kathryn on OPI.
- To qualify for OPI, they must be physically assessed, and have an income below \$1,374 per month for a single person. For people with \$713 or more in monthly income, they must pay a co-pay amount based on a sliding fee scale.
- Each OPI recipient receives an average of \$150.00 per month in services.
- Under Medicaid, it could cost the state of Oregon 5-10 times as much to care for them in a more intensive setting. Many would no longer be able to live at home.

The Average Cost of Care in Oregon

- Nursing Home= \$2,800 per month
- Assisted Living Facility= \$1,400 per month
- Adult Foster Home= \$800 per month
- In Home Care= \$660 per month
- OPI= \$150 per month

Long Term Care Services for Levels 15-17

17 categories of client impairments known as "survival priority levels" have been established by Senior and Disabled Services Division. The levels categorize a person's need for assistance with activities of daily living such as eating, toileting, mobility, bathing and dressing. Priority Level 1 clients are the most impaired and are likely to receive care in a nursing facility.

- Priority Level 15-17 clients are most likely to receive in home assistance but the clients are considered eligible for nursing facility care under Medicaid law that includes Oregon's home and community based waivers.
- Most clients have chronic health conditions such as arthritis, diabetes, cancer, stroke, hypertension or heart disease.
- Many receive coverage for their prescriptions. Without this assistance, deterioration in their health status could occur.

Louise is 92 years old. She uses a walker, has heart disease and is frail at 84 pounds. She is a Priority Level 15 client. Louise has a nephew who helps out when he can. Louise receives \$675 per month from Social Security and feels she does fine with what she has. She appreciates the help she gets from Multnomah County Aging and Disability Services. She wants to remain in her own home.

Restructure Community Based Care provider rates (\$8.0 million)

The Governor's budget includes a restructuring of community-based rates that decreases the budget by \$15.8 million (\$6.4 General Fund). A plan to restructure rates has not been completed. The proposal is based on the belief that providers should be paid based upon the client impairment level and the care they provide, rather than on the type of facility they operate.

- The proposal in the Governor's budget would reduce payments to assisted living facilities, residential care facilities, and client-employed providers (CEPs).
- The proposal would increase payments to adult care home operators.

- Hourly rates paid to CEPs would not change, but the number of average hours per case would be lowered from an average of 72 hours each month to 68 hours. Providers would be paid higher rates (or allowed more hours) to care for more impaired clients.
- The proposed budget eliminates payments to cover inflation for adult foster care homes, residential care facilities, and assisted living facilities.

Reduce Administration, including case management positions (\$11.6 million)

The Governor's budget includes program reductions that eliminate 51 state and 33 Area Agency on Aging and Disability full time staff positions.

- Reductions in staffing have already occurred with increasingly leaner budgets.
- Administrative positions take care of many functions that would otherwise take time away from a case manager's time with clients.
- Paperwork continues to be a large part of a case manager's job and requires staff time to complete.
- With the elimination of OPI and the 15-17 service priority levels, demand on case manager's time will increase.



AGING AND DISABILITY SERVICES FY 02 BUDGET SUMMARY

Prepared for the DSAC and EIAC

February 21, 2001

Attached for your consideration is a summary comparison of the Requested ADS FY 02 Budget with the current year FY 01 Adopted Budget. As you can see, total revenue and expenditures are proposed to be reduced by \$1,115,946. Part of the reduction results from a change in budgeting practices. The proposed budget will put Title XIX Medicaid money directly in the General Fund thus eliminating the double counting of that revenue and expenditure.

Revenue Assumptions

- Older American Act funds:
 - 1% increase in appropriations.
 - new funds have been added for the Family Caregiver Support Programs.
 - projected carryover.
- Oregon Project Independence is decreased by half of the current biennial allocation at the level suggested by the Legislative leadership.
- The City of Portland funds are budgeted at the current level plus an increase of \$120,000 to reflect the full year's funding of the additional money approved last year by the City Council.
- The Multnomah County General Fund:
 - reduced by 4.6%.
 - an increase of \$716,051 to pay debt service costs for the East County Office. The net result is a slight increase of County General Funds.
- Title XIX Medicaid funds:
 - increase over the current biennium allocation by 1.6% to reflect caseload growth.
 - Use 49% of the biennial allocation for FY 02.
 - The match ratio for use of County General Funds to generate additional Title XIX Medicaid funds is slightly higher than during the current fiscal year.
- All other revenue is budgeted at the same level as the current fiscal year. This includes fines and fees, USDA allocation and miscellaneous sources.

Expenditure Assumptions

- Personal Services are budgeted at the same FTE level as the current fiscal year.
- Salaries and payroll costs have been increased to reflect a one step increase for employees and a reduction in PERS rates and increases in medical and dental costs. The estimates do not include a COLA.
- A 2% salary saving is budgeted. This equates to a staffing reduction of approximately 8 FTE and the funds will be recouped by managing vacancies as they occur during the fiscal year.
- The resources passed through to contractors have been reduced to reflect the reduction of the OPI revenue.
- External Data Processing costs have been decreased to reflect completion of the development of the new Client Information System during this fiscal year.
- Indirect Costs are decreased because the ADS Indirect Rate has been reduced by approximately 1.5% and the expenditures on which the rate is applied have been reduced.
- There is no PC Flat Fee budgeted for FY 02. With the receipt of approximately 150 new lap top workstations, ADS will be able to replace existing older PC's with newer models currently in the agency. ADS still has a positive balance of funds in the PC Flat Fee account.
- Building Management costs have increased by approximately 45% because of the opening of the new East County Office and entering new lease agreements for the West District Office and the Central Office.

Impact on ADS Programs

This budget is being brought into balance by the following ways.

- Expenditures for the OPI program have been reduced by approximately \$591,138. This money goes for direct services to clients (\$359,802), case management services provided by the Senior District Centers (\$193,836) and administration (\$37,500). Results include reduction of services to 350 OPI clients thus endangering their ability to remain in independent living situations. The loss of case managers to assist those clients exacerbates the problem.
- A 2% salary saving is being budgeted. This equates to a reduction in services during the year from 8 FTE. As vacancies occur new hires will be put off for an extended period of time. Results may include juggling of

caseloads, increased response times for information and administrative tasks, decreasing ability to provide the current level of service to clients.

- An increase in Title XIX resources based on caseload growth without a corresponding increase in positions to handle the growth. Results will include larger caseloads, putting a strain on the ability of the system to provide quality service to clients, eventual "burn out" of staff and deteriorating service.

Options to Consider

There are several options to consider in dealing with this situation.

- **Maintaining Current Service Level Funding**

Those concerned with the ADS system should continue to make the case for resources to continue the provision of quality services at the current level.

- **Eliminating or Reducing Existing Programs and Reprogramming Resources**

To offset the cuts in the OPI program ADS will prioritize among services in order to target all funds at the most vulnerable. It might be possible to eliminate or reduce several existing programs to free up resources for the OPI program. Options include:

- cut \$165,000 for transportation services,
- eliminate the Emergency Housing Assistance Program (\$200,000).

- **Reducing Staff**

The proposed budget contains the effective reduction of 8 FTE in services. Additional cuts will be made as needed. Because of the nature of ADS funding sources a reduction of one FTE may not result in equivalent resources which can be used for another program. For instance, a reduction of an FTE in a Title XIX Medicaid program will not result in resources that can be used for OPI clients.

- **Work load Reduction**

ADS staff spend an inordinate amount of time on Eligibility determination, especially for food stamps, general assistance, Medicaid. This causes case managers to focus more time on eligibility than on care planning for the client. With the cuts the Eligibility function must be simplified.

SUMMARY BUDGETS
COMPARISON OF FY 01 ADOPTED BUDGET TO FY02 REQUESTED BUDGET
7-Feb-01

FY2002 PROPOSED REVENUES

Revenue Category	FY 00-01 Adopted Budget	FY 01-02 Requested Budget	Difference
Older Americans Act	1,835,260	2,150,039	314,779
Oregon Project Independence	1,030,532	591,138	-439,394
City of Portland	514,815	629,768	114,953
East County Cities	20,750	20,750	0
County General Fund - Subsidy	2,382,752	2,056,606	-326,146
County General Fund-Match	2,693,807	3,043,918	350,111
Misc Match	37,739	44,302	6,563
Title XIX Medicaid -- State	19,135,038	18,576,410	-558,628
Title XIX Medicaid -Local Matched	6,070,101	6,862,710	792,609
USDA	350,000	350,000	0
Internal Svc Reimbursement	1,389,230	0	-1,389,230
All Other	510,549	528,986	18,437
TOTAL REVENUE	35,970,573	34,854,627	-1,115,946

FY2002 PROPOSED EXPENDITURES

Expenditure Category	FY 00-01 Adopted Budget	FTE	FY 01-02 Sample Budget-2	FTE	Difference
Personal Service					
Permanent	14,269,848	389.8	14,814,254	389.8	544,406
Temporary	23,750		23,750		0
Fringe Benefits	3,206,072		3,239,249		33,177
Insurance Benefits	3,233,223		3,607,344		374,121
Salary savings	0		-414,250		-414,250
Total Personal Services	20,732,893	389.8	21,270,347	389.8	537,454
Materials & Services					
Contractual Services	7,538,043		7,482,918		-55,125
Direct Material & Services	1,543,741		753,163		-790,578
Int.Serv. Reimbursements	6,145,896		5,348,199		-797,697
Total Materials & Services	15,227,680		13,584,280		-1,643,400
Capital Outlay					
Equipment	10,000		0		-10,000
Total Capital Outlay	10,000		0		-10,000
TOTAL EXPENDITURES	35,970,573	389.8	34,854,627	389.8	-1,115,946

FY 2002 REVENUE REVISION: REQUESTED
 ORG 1700 AGING AND DISABILITY SERVICE TOTAL
 DATE REVISED: FEBRUARY 6, 2001

REVENUE SOURCE

FUND 156

		FY2001	FY2002	
CODE	NAME	ADOPTED	REQUESTED	DIFFER.
2063	TITLE IIID	0	0	0
2064	TITLE IIIB	770,955	874,638	103,683
2065	TITLE IIIC-1	325,710	326,835	1,125
2066	TITLE IIIC-2	539,769	544,283	4,514
	TITLE IIIE	0	250,000	250,000
2067	TITLE IIIF	142,957	95,898	-47,059
2069	USDA	350,000	350,000	0
2070	TITLE VIIB	55,869	58,385	2,516
2387	OPI	1,025,532	586,138	-439,394
2395	STATE DEPT. VETERAN'S AFFAIRS	12,500	12,500	0
2399	OPI - A	5,000	5,000	0
2608	SHIBA	14,146	14,146	0
2609	TITLE XIX	25,205,139	23,987,995	-1,217,144
2704	CLACKAMAS COUNTY	10,000	10,000	0
2777	WASHINGTON COUNTY	7,500	7,500	0
2773	CITY OF PORTLAND	514,815	629,768	114,953
2774	CITY OF GRESHAM	25,000	25,000	0
2775	CITY OF TROUTDALE	3,000	3,000	0
2788	CITY OF FAIRVIEW	1,750	1,750	0
4017	CLIENT DONATIONS	0	0	0
4035	CEP FEES	27,000	27,000	0
4612	RENTALS/CONTRACTORS	238,942	238,942	0
4900	MISCELLANEOUS REVENUE	0	0	0
6257	DONATIONS - SPECIAL RISK	6,000	6,000	0
6818	PRIVATE ASSESMENTS	7,200	7,200	0
6823	PRIVATE GATEKEEPER GRANTS	3,000	3,000	0
2078	AOA GRANT	0	25,000	25,000
	UNITED WAY	0	0	0
6XXX	TOTAL PROGRAM REVENUES	29,291,784	28,089,978	-1,201,806
76SB	MULTNOMAH CGF SUBSIDY	2,292,069	1,959,719	-332,350
76IN	MULTNOMAH CGF INDIRECT	0	0	0
76MA	MULTNOMAH CGF MATCH	2,084,893	2,413,713	328,820
7601	MULTNOMAH CGF TOTAL	4,376,962	4,373,432	-3,530
	TOTAL FUND 156	33,668,746	32,463,410	-1,205,336

FUND 100

3010	ACHP LICENSING FEES	166,000	166,000	0
4030	PG/C FEES	20,000	20,000	0
6013	ACHP OTHER FEES	7,000	7,000	0
6170	ACHP FINES	20,000	20,000	0
6602	FED/STATE SVC REIMB/XIX	1,389,230	1,451,125	61,895
6XXX	TOTAL PROGRAM REVENUES	1,602,230	1,664,125	61,895
76SB	MULTNOMAH CGF SUBSIDY	90,683	96,887	6,204
76IN	MULTNOMAH CGF INDIRECT	0	0	0
76MA	MULTNOMAH CGF MATCH	608,914	630,205	21,291
7601	MULTNOMAH CGF TOTAL	699,597	727,092	27,495
	SUBTOTAL FUND 100	\$2,301,827	\$2,391,217	\$89,390

TOTAL DEPARTMENT

6XXX	TOTAL PROGRAM REVENUES	30,894,014	29,754,103	-1,139,911
76SB	MULTNOMAH CGF SUBSIDY	2,382,752	2,056,606	-326,146
76IN	MULTNOMAH CGF INDIRECT	0	0	0
76MA	MULTNOMAH CGF MATCH	2,693,807	3,043,918	350,111
7601	MULTNOMAH CGF TOTAL	5,076,559	5,100,524	23,965
	TOTAL REVENUE ADS	35,970,573	34,854,627	-1,115,946

FY 2002 BUDGET PLANNING DOCUMENT
AGING & DISABILITY SERVICES DEPARTMENT TOTAL (30)

2/16/01 4:06 PM

COST ELEMENT	COST ELEMENT DETAIL	FY2001 ADOPTED	FY 2002 REQUESTED	DIFFERENCE
60000	Permanent	14,269,848	14,814,254	544,406
60100	Temporary	23,750	23,750	0
60110	Overtime	0	0	0
60120	Premium Pay	0	0	0
60130	Fringe Benefits	3,206,072	3,239,249	33,177
60140	Insurance Benefits	3,233,223	3,607,344	374,121
	Salary Savings 2%	0	(414,250)	(414,250)
	TOTAL PERSONNEL SERVICES	20,732,893	21,270,347	537,454
60150	County Supplements	2,731,546	3,088,220	356,674
60160	Pass-Through	4,450,796	4,187,664	(263,132)
60170	Professional Services	355,701	207,034	(148,667)
	Contractual Services	7,538,043	7,482,918	(55,125)
60180	Printing	142,569	142,569	0
60210	Rentals	0	0	0
60220	Repair/Maintenance	25,930	14,435	(11,495)
60230	Postage	7,719	8,948	1,229
60240	Supplies	220,513	200,022	(20,491)
60260	Education & Training	144,699	188,730	44,031
60270	Local Travel & Mileage	141,689	141,689	0
60290	External Data Processing	823,852	20,000	(803,852)
60340	Dues/Subscriptions	36,770	36,770	0
	Direct Materials & Services	1,543,741	753,163	(790,578)
60350	Indirect	1,359,327	975,329	(383,998)
60370	Telephones	362,334	359,156	(3,178)
60380	Data Processing	332,500	370,721	38,221
60390	PC Flat Fee	120,800	0	(120,800)
60410	Motor Pool	124,384	101,308	(23,076)
60420	Electronics	0	0	0
60430	Building Management	2,355,205	3,414,319	1,059,114
60440	Other Internal Charges	1,389,230	0	(1,389,230)
60460	Mail/Distribution	102,116	127,366	25,250
	Internal Service Reimbursements	6,145,896	5,348,199	(797,697)
	TOTAL MATERIALS & SERVICES	15,227,680	13,584,280	(1,643,400)
60540	Other Improvements	0	0	0
60550	Equipment	10,000	0	(10,000)
	TOTAL CAPITAL OUTLAY	10,000	0	(10,000)
	TOTAL EXPENDITURES	35,970,573	34,854,627	(1,115,946)

SUMMARY BUDGETS
COMPARISON OF FY 01 ADOPTED BUDGET TO FY02 REQUESTED BUDGET
 Revised March 21, 2001

FY2002 PROPOSED REVENUES

Revenue Category	FY 00-01 Adopted Budget	FY 01-02 Requested Budget	Difference
Older Americans Act	1,835,260	2,150,039	314,779
Oregon Project Independence	1,030,532	591,138	-439,394
City of Portland	514,815	629,768	114,953
East County Cities	20,750	20,750	0
County General Fund - Subsidy	2,382,752	2,056,606	-326,146
County General Fund-Match	2,693,807	3,043,918	350,111
Misc Match	37,739	44,302	6,563
Title XIX Medicaid -- State	19,135,038	18,576,410	-558,628
Title XIX Medicaid -Local Matched	6,070,101	6,862,710	792,609
USDA	350,000	350,000	0
Internal Svc Reimbursement	1,389,230	0	-1,389,230
All Other	510,549	528,986	18,437
TOTAL REVENUE	35,970,573	34,854,627	-1,115,946

FY2002 PROPOSED EXPENDITURES

Expenditure Category	FY 00-01 Adopted Budget	FTE	FY 01-02 Sample Budget-2	FTE	Difference
Personal Service					
Permanent	14,269,848	389.8	14,300,824	375.3	30,976
Temporary	23,750		23,750		0
COLA	0		561,027		561,027
Fringe Benefits	3,206,072		3,115,300		-90,772
Insurance Benefits	3,233,223		3,486,040		252,817
Salary savings	0		-255,567		-255,567
Total Personal Services	20,732,893	389.8	21,231,374	375.3	498,481
Materials & Services					
Contractual Services	7,538,043		7,517,918		-20,125
Direct Material & Services	1,543,741		753,163		-790,578
Int.Serv. Reimbursements	6,145,896		5,352,172		-793,724
Total Materials & Services	15,227,680		13,623,253		-1,604,427
Capital Outlay					
Equipment	10,000		0		-10,000
Total Capital Outlay	10,000		0		-10,000
TOTAL EXPENDITURES	35,970,573	389.8	34,854,627	375.3	-1,115,946



MULTNOMAH COUNTY OREGON

AGING AND DISABILITY SERVICES

AREA AGENCY ON AGING

421 S.W. 5TH, 3RD FLOOR

PORTLAND, OREGON 97204

HELPLINE: (503) 988-3646 ADMINISTRATION: 988-3620

TTY: 988-3683 FAX: (503) 988-3656

BOARD OF COUNTY COMMISSIONERS

BEVERLY STEIN

- CHAIR OF THE BOARD

DIANE LINN

- DISTRICT 1 COMMISSIONER

SERENA CRUZ

- DISTRICT 2 COMMISSIONER

LISA NAITO

- DISTRICT 3 COMMISSIONER

LONNIE ROBERTS

- DISTRICT 4 COMMISSIONER

March 6, 2001

TO: All ADS staff, DSAC and Elders in Action
From: Jim McConnell

It feels like Spring - and change is in the air. Here are some updates relating to what we do.

1. ADS FY 2001-02 Budget.

a) The revenue picture for ADS is so uncertain at this stage that we are having difficulty developing any kind of accurate budget for next year. We have seen proposals to cut funding; others to restore the cuts at the State level. What is certain is that there will be **no increases** in services, programs, or staff.

b) The latest version of the ADS budget shows:

- Funding for COLA for staff. A previous version assumed that we would have enough savings during the year to make up the cost of the COLA. Now we have included funding for it, but have to make cuts somewhere else.
- OPI at 50% of current level, meaning cuts in Home Care for clients, and cuts in Case Management for District Centers.
- Reduction of 11 positions at ADS - 4 from Central, and 7 from Program areas. These are positions that we don't want to let go of, and will work hard to retain. This does not mean that we are looking at lay-offs for staff in those positions. At this point, we don't have enough information to make that prediction.
- **The following positions are changed but there is no net increase or decrease in numbers:**

- Branch manager positions are eliminated; they are replaced with District manager, Case Manager Supervisor, and Protective Services manager positions (See new ADS Organizational Structure).
- There is one Deputy Director Position; the second Deputy position is converted to a Long Term Care Manager position.
- The Oregon Health Plan coordinator position is eliminated; some of its primary functions will be assumed by the Policy Specialist position.
- The Client Placement Specialist position is eliminated; Case Managers will do more of this function, assisted by improved technology.
- A Technology Development specialist position is added to steer the ADS conversion to an improved Client Tracking system
- A Measurement and Evaluation Specialist position has been added to improve ADS' ability to track, analyze, and report data. For almost 15 years, ADS has been dependent on the State system to track and analyze data. This has become less dependable and responsive. ADS needs to upgrade its own tracking system, and collect its own data.

c) Add Packages. ADS will prepare proposals for new funding at the request of the Advisory Committees, or in pursuit of previous commitments:

- Funding for Community Use programs at the new East County Building.
- Funding for 1.5 FTE positions at the Public Guardian program from Mental Health Funds.
- Funding to improve the Client-employed provider program serving frail elderly and persons with disabilities.
- Funding to cover shortfalls in OPI.
- \$50,000 tentatively committed last year to YWCA for the Downtown Senior Center development.

2. Board of County Commissioners (There are 5 members of the Board, including the Chair. The Chair also serves as the Chief Executive).

- Chair Beverly Stein has announced she will resign from the Board March 14. She plans to run for Governor.
- Bill Farver, Beverly's Chief of Staff will serve as acting Chair of the Board until a new Chair is elected.
- Commissioner Diane Linn has announced that she also will resign March 14 to run for the Chair of the County Commission.
- Pauline Anderson, who used to serve on the Commission, will replace Diane until that position is filled by election.

- The vacant positions could be filled as soon as May 15, 2001. If no candidate gets more than 50% of the vote, there will be a run-off election soon thereafter.
- A third Commissioner, Serena Cruz, is considering resigning to run for Chair. She will decide by Friday March 9.

Department Directors serve at the pleasure of the Chair. Bill Farver has indicated that he plans no changes at the Department leadership level during his time as Chair.

3. New Hire at ADS

I am pleased to welcome Tanya Colie McGee as the new Long Term Care Manager at ADS. Tanya has worked in various positions at SDSD and DHS with progressively increasing levels of responsibility. Tanya is a resident of Northeast Portland and brings an impressive mixture of knowledge of our programs, management skills, and enthusiasm for community advocacy for Persons with Disabilities and Elderly.

Citizen Budget Advisory Committee

for the

Community and Family Services

Department

&

Multnomah Commission on

Children and Families

**MULTNOMAH COUNTY
DEPARTMENT OF COMMUNITY AND FAMILY SERVICES
CITIZEN BUDGET ADVISORY COMMITTEE
421 SW Sixth Avenue, Suite 700
Portland, Oregon 97204**

MEMORANDUM

TO: Central Citizen Budget Advisory Committee

FROM: Doug Montgomery, Ph.D., Chair
DCFS Citizen Budget Advisory Committee

DATE: March 15, 2001

SUBJECT: DCFS CBAC 2000/2001 Budget Report

PROCESS:

The Department of Community and Family Services (DCFS) Citizen Budget Advisory Committee (CBAC) continues to meet on a monthly basis to review program activities, projects and budget information. Each month we receive a budget update, information on new funding opportunities identified by the department, an update of the Mental Health Redesign, and a status report of Strategic Planning activities. Our most recent meetings have centered on review and development of the 2001/2002 fiscal year budget priorities, strategies, and programs.

With the County facing a General Fund shortfall of \$15-20 million in FY 2001/02, the budget process was quite difficult across County programs. In DCFS, although the overall budget has increased from the current year, it reflects a reduction in County General Funds of approximately \$3.4 million. To compound the difficulty of putting together a balanced budget, it was necessary to minimize the reductions in several areas. The Mental Health system has just undergone 18 months of review and redesign, so deep cuts to this area were not appropriate. In Developmental Disabilities it was also necessary to minimize budget reductions to core program services given the required plan for implementation of universal access.

We applaud the Department's strategy of minimizing program and service reductions by including projected revenue from the Federal Financing Participation (FFP) project. This project has a potential to increase the ability to match County dollars with Federal funds. The Department's budget request includes projected revenue from FFP in the amount of \$1.5 million, thus reducing the necessity to cut programs and services in that amount. In addition to the increased FFP, the department used a strategy to reach a balanced budget by including savings realized from improved efficiency, administrative reductions and program reductions. We urged caution in the projection of FFP funds.

MAJOR CHANGES:

During this past year, the Mental Health System has undergone an extensive review and is in the process of developing a redesigned business model. To assist in the redesign, the DCFS budget

reflects the creation of a sixth division, the Mental Health Organization (MHO) which was formerly part of the Behavioral Health Division.

As a result of the Department efforts to improve efficiency, other changes include, combining of several functions that had previously been provided by two or more Divisions within the Department. The budget reflects the consolidation of the Developmental Disabilities (DD) and Behavioral Health Division (BHD) Protective Services units into one; the consolidation of the DD and BHD records rooms under one records supervisor; the consolidation of training and education efforts across the department; and the consolidation of all purchasing activities.

The Department continues to be a leader in a number of significant initiatives such as SUN Initiative, development of the Child Receiving Center, planning for DD's implementation of universal access, and ongoing support of the Community and Family Service Center system.

ADD PACKAGE REVIEW:

No formal add packages have been solicited at this point.

CONCERNS:

DCFS was required to make \$3.4 million in County General Fund cuts to balance their budget. The proposed cuts will reduce staffing by 12.04 FTE (full time equivalent) if the Department realizes the projected Federal Finance Participation Funds but could be reduced up to 29.74 FTE should those funds not materialize. We also encouraged conservative projections of the FFP funds to avoid overspending and additional cuts. The majority of the staffing cuts were made to administrative and support positions, with minimal cuts to direct service staff. With no increase in County General Fund to cover the cost of living increase in addition to no cost of living funding from Federal and State sources, cuts were required in all areas of the department.

The DCFS Citizen Budget Advisory Board appreciates the openness of the Department as it struggled with these difficult decisions and fully supports the approach the Department took to minimize program and service cuts. We appreciated their hard work since managers at all levels were involved in planning cuts in working programs. Senior management and their staff worked particularly well with uncomfortable decisions. We stress the need for full support of this budget by the Board of County Commissioners.

EMERGING ISSUES:

No emerging issues at this time.

MEMBERSHIP:

This report is submitted on behalf of the DCFS Citizen Budget Advisory Committee and its members:

Doug Montgomery, Chair
Robert J. Gassner
Muriel Goldman
Susan Oliver

memorandum

TO: Multnomah County Central Citizen Budget Advisory Committee

FROM: Doug Montgomery, Ph.D, Chair of Commission CBAC and Jim Clay, Executive Director
Commission on Children, Families and Community

DATE: March 15, 2001

SUBJECT: FY 2002 submitted budget



Here are highlights of key budget and policy issues for fiscal year 2002. Following this memo is a summary of submitted budget expenditures, and a comparison to the FY 2001 budget expenditures. The citizen review was complicated with the reorganization efforts pursued concurrently.

Overall Situation

The Commission on Children, Families and Community (CCFC) relies primarily on State revenues, so the projected County General Fund shortfall will have a limited but telling impact. The state budget however, is also a challenging matter and we expect to see significant changes to revenue streams. We anticipate these changes will include both increases (in the area of youngest children) and decreases (in the area of adolescents and education). The total net impact may well be a significant increase, although the imbalance of the changes over the differing ages groups will be difficult at best. No conclusion can be drawn until after the Legislature approves a budget agreeable to the Governor months from now. Private investments from foundations, businesses and other community partners remain a small but growing source of revenue. The County General Funds dollars are important to the success of our programs so that any reduction in projected cuts will strengthen our activities.

Policy and Planning Consolidation

The CCFC, the Leaders Roundtable and the SUN Schools Sponsor Group are discussing potential consolidation of policy and planning work on behalf of Multnomah County children and families. If this occurs the resulting organization is likely to gain a diversified and slightly expanded revenue base. The final decision is not expected to be timely.

Comparison of FY 2001 Budget with FY 2002 Submitted Budget

Nearly all categories of CCFC activities project reductions. Paralleling State policy, this is reflected most significantly in a reduction of support for adolescents and their families. Although not showing in the CCFC budget, CCF funds to directly passed through to County Departments, show major reductions in support for adolescents and their families.

The major challenge

Although cuts in budgets are difficult, finding an appropriate balance will be the biggest task as the County pares down in some areas but not others. Maintaining our ability to allow thoughtful policy to drive budget decisions, rather than competition for resources, will be the key.

Members

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Analysis of CCFC proposed FY 02 budget

CCFC Program/Activity*	FY01	FY02	diff.	%diff.	FY2002 FUNDING SORTED BY FLEXIBILITY			rationale for establishing requested budget.
					(flexible funds: adolescents) YI/JSA/CGF	(restricted funds: young children) Great Start	(non-flexible funds) for specific, dedicated purposes	
Administration	398,833.00	260,055.00	138,778.00	-35%			260,055.00	admin is at max % allowable by OARS; significantly reduced from CSL, reflects revenue losses; seriously low.
Early Words	560,291.00	289,574.00	270,717.00	-48%		260,307.00	29,267.00	voluntary program cut; intent is to be aggressive in expanding private leverage, successful to date.
Connecting for Kids	332,466.00	140,374.00	192,092.00	-58%	140,374.00			voluntary program cut; remaining balance is minimum needed for C4K consolidation still in development.
CCFC operations, m'ship, outcomes	102,394.00	113,756.00	(11,362.00)	11%	86,528.00	27,228.00		addressing an area that has had inadequate support.
Executive Committee	164,225.00	56,100.00	108,125.00	-66%	45,983.00	10,117.00		CSL effectively maintained as is; FY01 had OTO costs.
Marketing/public communications	307,555.00	323,459.00	(15,904.00)	5%	303,459.00	20,000.00		core part of Take the Time; leverages 5:1 private match +.
Evaluations	60,000.00	59,050.00	950.00	-2%	46,698.00	12,352.00		core accountability effort; program evaluations.
Policy & Planning	163,033.00	168,020.00	(4,987.00)	3%	51,836.00	99,851.00	16,333.00	policy and planning is state mandated CCFC function.
Poverty Advisory	109,500.00	100,000.00	9,500.00	-9%			100,000.00	CSL reduced by reduction in CGF; CSBG is dedicated to PAC staffing, operations and committee.
ECCEC	107,610.00	76,898.00	30,712.00	-29%		39,670.00	37,228.00	FY01 had OTO costs; successful in private leverage.
Take The Time	726,100.00	589,519.00	136,581.00	-19%	389,919.00	86,310.00	113,290.00	voluntary program cut; voluntary staff reduction; intent to be aggressive expanding private leverage, successful to date.
Youth Advisory Board	50,488.00	46,809.00	3,679.00	-7%	46,809.00			voluntary staff reduction.
BCC initiatives	265,000.00	-	265,000.00	-100%				initiative eliminated.
Mandated Direct Services								
CASA	81,619.00	81,619.00	-	0%			81,619.00	No change known, but may increase.
Relief Nurseries	510,001.00	384,300.00	125,701.00	-25%			384,300.00	2nd year of biennium had significant expansion.
Family Preservation and Support	762,117.00	258,529.00	503,588.00	-66%			258,529.00	MCHD plans to carry-over 258,000 from FY2002
Discretionary Direct Services (block granted to DCFS; see their list)								
Adolescent svcs. (JSA, YI, SRI)	870,397.00	870,397.00	-100%					Major elimination funds for adolescent direct services
Early Childhood svcs. (GS, CCDF)	354,156.00	365,710.00	(11,554.00)	3%		163,710.00	202,000.00	Legislature may provide MAJOR increases, or add entirely new fund stream; many unknowns; coord. w/Lisa Naito
Adolescent svcs. overseen by CCFC	129,846.00	86,860.00	42,986.00	-33%	86,860.00			CCFC picks up DCFS contracts meeting CCFC criteria for service contracts, and consistent with Governor's policy

*CCFC program allocations include staff and operations in this view

Citizen Budget Advisory Committee

for the

Department of
Juvenile and Adult Community Justice

**DEPARTMENT OF COMMUNITY JUSTICE
CITIZEN BUDGET ADVISORY COMMITTEE**

TO: Central Citizen Budget Advisory Committee

FROM: Community Justice Citizen Budget Advisory Committee (CBAC)

DATE: March 15, 2001

SUBJECT: Department of Community Justice Fiscal Year 2001-02 Report

Process:

From December through March, the committee met with several assistant directors and managers to review programs throughout the department.

Major Changes:

Due to severe budget cuts required by reductions in funds from the Oregon Youth Authority as well as the county-wide reduction in projected general fund revenue, increased facilities costs and the cost of providing cost of living increases for programs and staff funded by state and federal funds, the Department is recommending the following program cuts:

Adult

1. Reduce staff in the African-American program
2. Relocation of offices to more effectively use the Mead Building
3. Termination of 7 Corrections Technician positions
4. Termination of one crew leader position for the Forest Project
5. Elimination of contract to provide services to women with histories of prostitution
6. Reduction of parking fees by moving Alternative Community Service vans from downtown parking at the county lot to the Juvenile Justice Complex
7. Reduction in fleet
8. Reduction in housing contracts for adult offenders
9. Reorganization of the Centralized Team Supervision model (casebank)
10. Elimination of an employment services contract
11. Elimination of two management positions

Juvenile

1. Elimination of the Turnaround School
2. Reduce Day Reporting Center services
3. Eliminate skill development contract
4. Reduce field supervision staff
5. Eliminate two management positions
6. Cut Gang Transition Services contracts
7. Eliminate contract with Portland Public Schools for Family Resource Center staff
8. Redesign and reduce School Attendance Initiative
9. Cut contract for alcohol and drug treatment assessment and treatment in Custody Services

10. Eliminate one General Detention Unit
11. Eliminate Multisystemic Family Therapy (MST) Program
12. Eliminate one position that serves the dependency court
13. Reduce staff in counseling programs

Cross-Departmental

1. Materials and supplies reductions related to reduction in staff positions
2. Reduction in training funds
3. Change staffing pattern in the Forest Project/Alternative Community Service Programs

Treatment Services

1. Reduce InterChange (residential alcohol and drug treatment for male offenders) funding from seventy to fifty beds
2. Reduce one management position
3. Eliminate housing contract for offenders with mental health needs
4. Eliminate anger management contract
5. Eliminate contract for Mental Health consultations in the field offices

Information Services

1. Cut two positions
2. Reduction in replacement costs due to staff reduction
3. Reduction in equipment/supply budget
4. Reduction in consulting contract

Business and Centralized Services

1. Eliminate one management position in the Director's Office
2. Reduce funds for contracted evaluation services
3. Eliminate position in financial services
4. Reduce organizational consulting funds in Director's Office
5. Move funding for Safety Coordinator position to Central Services
6. Position reclassification in Employee and Community Development

Add Package Review

No add packages were submitted

Concerns

We are very concerned about the size of the cuts being required of Community Justice. Particularly on the Juvenile side where many of the more innovative and proactive programs are being cut. We view this as a step backward to a time when the emphasis was on locking offenders up and doing no more. While detention is needed in some cases we believe that early intervention is the most productive use of taxpayers' monies and more constructive to the potential offenders and their families.

Departmental Effectiveness and Organization

1. A cost analysis is needed to determine whether centralized administration is cost effective. *(This has been a concern for the past two years.)*

2. Are an appropriate number of management cuts being made in proportion to line staff cuts?
3. The juvenile system is taking a proportionately higher level of cuts than the adult system.
4. SPIN and JIN Information Technology efforts should be continued but the committee would like to do a review of this progress over the next year, including how they are integrated with the state system.

Evaluation and Performance

5. The Department needs to relate budget decisions to key results and other performance measures and research findings.
6. The committee would like to see continued support for research and evaluation functions.
7. The Department should continue to develop objectives and effectiveness measures for programs and contracts.
8. Program evaluations should include cost-benefit analyses of programs and practices.

Continuum of Services

9. With the number of reductions being taken in prevention programs, there is a concern that the continuum of services is being compromised.
10. There is a great deal of concern about the cuts in the School Attendance Initiative program. Although the Committee supports the full funding of the School Attendance Initiative, it feels that the proposed cuts have been made in an appropriate and thoughtful manner.
11. The Department may also need to look at changes in its philosophy as a result of the cuts. Are prevention and use of best practices still a priority?
12. Is it wise to cut proven best practices programs such as Multisystemic Family Therapy?
13. The Committee supports the Department in vigorously pursuing the restoration of Oregon Youth Authority cuts.

Community Impact

14. The proposed cuts may have a disproportionate impact on minority communities and in Northeast and Southeast Portland. Does the department have a strategy to deal with these concerns?
15. There is concern also about the impact on the continuum of alcohol and drug services.
16. The Committee recognizes the efforts the adult system in particular has made to cut costs by looking for efficiencies instead of cutting services and entire programs.
17. The depth of the budget cuts will mean a new era for the Department. How will DCJ communicate to the community an understanding of how the system works?

Emerging Issues

Early Intervention and Prevention

1. The Committee supports early intervention efforts and believes that the Department should make strong efforts to work with community partners to continue and strengthen these efforts in the future.

2. The Committee is supportive of the continued development of the Transitional Services Unit as another example of preventive services the Department provides.
3. This Committee supports the need for a full range of alcohol and drug treatment options for juveniles.
4. The Committee supports the continued development of a Family Unit within the Department to identify and develop common approaches to dealing with families who are involved with both the adult and juvenile sides of the department.
5. The Department should continue to work with school partners to identify the high risk pupils who, if provided services, may be diverted from the criminal justice system.

Departmental Organization

6. The Committee supports the ACJ Phase II redesign with continued evaluation of its effectiveness.
7. The Committee supports the continued evaluation of the department re-organization and also supports more cross-over of services between the adult and juvenile divisions.

Committee Members

Mark Jones, Chair
Susan Cox
Art Hendricks
Bill Hoffstetter
Charlotte Cook

Department of Community Justice Staff Presenters

Kathy Treb, Assistant Director
Jim Rood, Assistant Director
Rich Scott, Assistant Director
Shaun Coldwell, Business Services Manager
Pat Franck, Senior Administrative Analyst
Phil Lingelbach, Juvenile Justice Counseling Manager
Horace Howard, Juvenile Justice Custody Services Manager

Citizen Budget Advisory Committee

for the

Multnomah County
District Attorney's Office

District Attorney
Citizen's Budget Advisory Committee
2001/2002 Budget Report

Process

The District Attorney's CBAC met during the months of January, February and March 2001. During the meetings the CBAC met with the District Attorney and his budget staff. The CBAC was briefed on a number of important issues facing the District Attorney and discussed the challenges facing the Office in the coming year.

Major
Changes

- **Cut of positions-** the District Attorney's proposed budget reflects the elimination of 23.97 positions within the Office. These reductions are a result of the 7% general fund reduction budget constraint and a number of grants that will expire during the next fiscal year. The result is a projected overall budget reduction of 9% over the 2000/2001 budget.
- **Administrative Services Reorganization-** an internal reorganization of the District Attorney's administrative structure will consolidate management of Finance/Budget, Human Resources and Information Technology Services under the District Attorney Operations Manager. In addition to this years budget constraint there are other changes impacting administrative services. The decentralization of Human Resource and Finance functions at the County level has significantly increased the workload on existing District Attorney staff and created a need to dedicate additional resources in this area.
- **Forfeitures-** In November 2000, voters passed Measure 3 which radically changed the forfeiture laws in Oregon. Since its passage, forfeiture funds can no longer be used to finance the act of forfeiture itself. Forfeiture dollars had been used, in part, to fund the District Attorney's Forfeiture Unit, which consisted of two Deputy District Attorney's and one and three quarters support staff. The proceeds had also been used to help support the Regional Organized Crime and Narcotics Task Force (ROCN).
- **Grant Funding-** the District Attorney's Office actively pursues grant funding opportunities and agency partnerships to carry out innovative new programs. In fiscal year 2000/2001 the Office brought over 1.5 million dollars in grant funding to Multnomah County. Some of these grants will expire during the current fiscal year, while several others will expire in fiscal year 2001/2002. It is estimated that by the end of the current fiscal year, grants totaling \$1,265,820.00 will expire with an additional \$694,328.00 in grant funding expiring during the 2001/2002 fiscal year.

Add Package Review

Not applicable.

Concerns

- The CBAC acknowledges the continued efficiency and effectiveness with which the District Attorney's Office approaches its responsibilities. The Office continues to provide innovative programs such as Community Courts and Neighborhood DA's that have a positive impact on the quality of life, and save the tax payers money. In addition the Multi-Disciplinary Team and White Collar Crime Unit continue to do important work in protecting the rights of the counties most vulnerable citizens, children and the elderly. The CBAC is concerned that large cuts in the District Attorney's budget will significantly harm the progress and ability to continue reaching out into the community with these valuable programs.
- The CBAC is concerned that the District Attorney's Office will absorb a disproportionate cut and that too many functions may be effected. The District Attorney's budget currently uses only 2% of the overall county general fund, but depends on general fund dollars for 74% of its overall budget. The budget constraint proposed will cut deeper into the basic operating budget of the District Attorney's Office than other county agencies who rely to a lesser degree on general fund revenues.
- The CBAC believes that the District Attorney's Office, its functions and programs should be viewed as a priority in the county and that budget decisions should be based on merit and value to the tax payers. The 7% across the board constraint, while offering a simpler less complex methodology, results in cuts the committee feels are too large and effect too many functions especially in light of previous years reductions within the District Attorney's Office,
- The process of electing a new County Chair during this crucial time in the budget process is concerning to the CBAC. Making decisions that effect the operational funding of a large governmental organization are always complex. The anticipated shortfall in general fund revenue for fiscal year 2001/2002 intensifies the difficulty, complexity, and care with which the budget decisions should be made. The committee believes that those County officials, who have a public mandate to make the decisions, must be allotted sufficient time to study the relevant issues in order to make informed budgetary decisions.

Emerging Issues

- **Gresham Court.** In recent years the number of misdemeanor cases scheduled at the Gresham District Court has increased so substantially that expansion of the Courts capacity in Gresham has become an issue. The Court believes that in order to reduce or eliminate the backlog of hearings, the number of courtrooms must be increased soon. The District Attorney's Office has been a proactive partner during the process of relocating the Gresham court and will also need to increase the number of staff assigned to the Gresham Courts in order to accommodate the addition of courtrooms .
- **DA case tracking system (DACTS).** The District Attorney's case tracking system has been on-line since 1993 and is approaching the end of its practical usefulness. Improvements in data base, data storage and interface technologies make replacing DACTS very desirable from both end user and maintenance perspectives. The District

Attorney's Office will be working with Multnomah County Information Services Division (ISD) to analyze the possibility of replacement for the aging case tracking system.

Additional Information

CRIMINAL PROSECUTION

Felonies

In 2000 the District Attorney's Office opened 9,151 felony cases, a similar number to those issued in 1999. These cases involved the most serious crimes including rape, homicide, burglary, arson, and robbery. The deputy district attorneys who work on these cases are highly trained and have an average of 10 years of experience as prosecutors.

Targeted Crimes

Measure 11 crimes are the most serious felonies. Since April 1, 1995, when the measure went into effect, 946 juveniles and 5,479 adults have been arrested on Ballot Measure 11 offenses.

Reducing the supply of drugs in the community through aggressive enforcement and prosecution of drug offenses is part of the local drug control strategy. Deputies issued over 4,000 felony drug cases in 2000.

Another aspect of drug control is reducing the demand for drugs. The Drug Court and the S.T.O.P. Program sponsored by Circuit Court and the District Attorney's Office offered 250 drug offenders treatment and recovery opportunities in 2000. The Drug Court balances the concern for protection of society with the rehabilitation of offenders.

Successful completion of the treatment program means criminal charges are dropped.

The District Attorney's Office continues to be a member of the Youth Gun Anti-Violence Task Force (YGAT). YGAT combines personnel from federal and local law enforcement in a concentrated effort to reduce youth gun violence and the illegal possession and transfer of firearms. In association with the U.S. Attorney's Office, one of our deputies prosecutes firearm cases in federal court. Through a federal grant, our Office added a second deputy to YGAT to focus on the prosecution of violent juvenile offenders and juvenile gang-related cases. Since June 1998 the taskforce has been involved in the arrest and prosecution, in both state and federal court, of over 340 people. YGAT served 97 search warrants, seized 472 guns, \$130,500 in cash and \$220,000 in property. In the past year, more than 100 youths were also prosecuted in juvenile court. Youth homicides and drive-by shootings have continued to decline.

The White Collar Crime Team, begun in August 1999, focuses on cases of securities fraud, criminal mistreatment of the elderly by fraud, large-scale employee embezzlement, and computer crime. Results show an upswing in prosecution of complex financial fraud schemes and substantial prison terms for convicted offenders since the team began its work.

Misdemeanors

There were 11,502 criminal misdemeanor cases opened in 2000. These cases involved crimes of theft, prostitution, assault, harassment, trespass, and other unlawful acts. In addition, 3,453 cases of driving under the influence (DUI) were opened. Though DUI is

not a felony, it can have a lasting impact on its victims. Because of the serious nature of the offense, DUII cases are prosecuted aggressively and are not subject to plea negotiation.

CHILD PROTECTION AND FAMILY JUSTICE

Multidisciplinary Child Abuse Team

Criminal child mistreatment cases continue to be some of the most serious crimes we encounter every year. The Multidisciplinary Child Abuse Team (MDT) is a group of dedicated child and health care professionals, law enforcement officers, and prosecutors committed to providing an immediate response to every child abuse case reported in Multnomah County. In 2000 they reviewed 3,002 cases of suspected child abuse.

Support Enforcement

Another aspect of child protection is the enforcement of child support orders. There are 8,875 cases requiring enforcement of child support orders in Multnomah County. Child support collections totaled \$27,940,085 in 2000. This amount exceeded the 1999 collections by over \$900,000.

Delinquency

Juvenile crime is of special concern to citizens. Recognition of this fact was clearly demonstrated in the fall of 1994 when voters overwhelmingly approved the passage of Ballot Measure 11 and again in 2000 when voters soundly rejected a ballot measure to overturn Measure 11. This measure requires prosecution in adult court of all who are charged with certain offenses, whether they are adults or juveniles, and identifies minimum sentences for those convicted of these specific crimes.

By moving the most serious juvenile offenders to the adult court, greater attention can be given to those juveniles who may be more responsive to the services available through the Multnomah County Juvenile Court. During 2000, there were 2,050 juvenile delinquency cases reviewed for crimes ranging from Arson to Unauthorized Use of a Motor Vehicle.

Dependency

When children are abused or neglected or when parents are unable to care for their children, the state must intervene. In 2000 there were 968 children who required the protection of the state. These children, some of whom may require special care, receive services from the State Office for Services to Children and Families. When efforts to keep a family together are exhausted and families are not able to care for children, the state does intervene by terminating parental rights. In 2000, 191 children were freed for adoption, making it possible to place these children in permanent homes.

Domestic Violence

The District Attorney's staff also gives special attention to victims of domestic violence. In 2000 there were 3,425 reports of domestic abuse referred to the District Attorney's Office from police agencies. In addition to prosecution, emphasis is placed on helping the

families involved by referring them to needed services. A six-month treatment program is available for those defendants who are eligible for the deferred prosecution program. The defendants in this program are closely supervised by probation officers. Every effort is made to assist and protect the family and to prevent further violence.

NEIGHBORHOOD DA PROGRAM

Begun in November of 1990, this innovative program is designed to assist communities in solving local crime problems. The Neighborhood DA Program uses the tools of the criminal justice system to demonstrate how the rule of law can help neighborhoods become safer and, as a result, has helped reduce problems of drug sales, thefts from cars, illegal camping, and other quality of life offenses in local communities. With financial support from Multnomah County, the City of Portland, federal grants, and Tri-Met, the program covers all neighborhoods in the county and the public transit system. In 2000, a tribute to the success of the program came from the U.S. Department of Justice when the Neighborhood DA Program was selected as one of two National Leadership Sites.

COMMUNITY COURT PROJECT

The Community Court Project had a successful third year of operation in the King Neighborhood Facility in Northeast Portland and opened a second Community Court in Southeast Portland at the Brentwood-Darlington Community Center. The project is a collaboration of the Multnomah County Circuit Court, Citizen Advisory Committees, the District Attorney's Office, the Metropolitan Public Defender's Office, the Multnomah County Sheriff's Office, and the Department of Community Justice. The Community Court Project focuses on quality of life crimes such as theft, prostitution, and trespass. In return for a guilty plea, defendants receive a sentence of local community service and have access to social services for help in housing, employment, health care, and drug and alcohol treatment.

Since the project began in 1998, 2,843 defendants have appeared in Community Court and 72% successfully completed their community service sentences. A total of 13,092 hours of community service valued at \$130,920 has been contributed to the northeast and southeast communities. In addition, 469 warrants have been cleared, saving at least \$48,588 in jail bookings.

During 2000, planning continued for a third community court to serve the Westside. The Westside Court is expected to open in early 2001.

VICTIMS ASSISTANCE PROGRAM

The District Attorney's Victims Assistance Program provides legal information and emotional support for victims of crime. Included in the program is an extensive volunteer network of over 80 individuals. These specially trained volunteers are on call 24 hours a day, 365 days a year, to provide aid and comfort to victims of sexual assaults.

Through the Victims Assistance Program, victims of crime can receive crisis intervention services, counseling, assistance with and information on the criminal prosecution process, and information and referral services. In addition, \$1,660,085.59 in restitution was collected for crime victims during the year. A total of \$18,697,618.77 has been collected and distributed to victims since the restitution program began in 1976.

MEMBER'S NAMES

Dick Wegner, Chair

Karen Burrell

Mike Greenlick

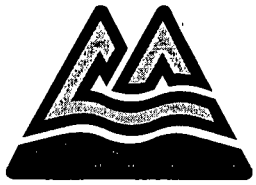
Irwin Mandel

Doug Menely

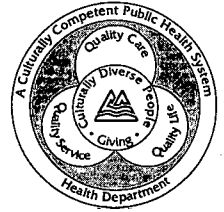
Bob Pung

Dave Simpson

Citizen Budget Advisory Committee
for the
Multnomah County Health Department



COMMUNITY HEALTH COUNCIL
An Appointed Citizens' Board



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BOARD OF COUNTY COMMISSIONERS

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DIANE LINN • DISTRICT 1 COMMISSIONER
SERENA CRUZ • DISTRICT 2 COMMISSIONER
LISA NAITO • DISTRICT 3 COMMISSIONER
LONNIE ROBERTS • DISTRICT 4 COMMISSIONER

Citizen Budget Advisory Committee (CBAC) Report Multnomah County Health Department Fiscal Year 2001-2002

Introduction

The Multnomah County Community Health Council has been in existence since June of 1980. It is an appointed group with members representing the health and social services community and, most importantly, consumer members who utilize the Health Department clinic services. In June 2000, the Community Health Council formally expanded its role to serve as the citizen advisory board for the whole of the Health Department. The Council works closely with the Director of the Health Department and the Board of County Commissioners to provide community guidance on a wide variety of public health services, programs and policies affecting Multnomah County residents.

Although Council's role has expanded during these twenty-one years, one of our most important functions as a Council is approval of the Health Department's annual budget. The Council's approval of the Health Department budget sets in motion a series of programmatic, personnel and fiscal decisions. As part of the Council's fiduciary responsibility to the community, we prioritize budget issues with the Health Department to plan for needed services and growth. Therefore, the CBAC committee works with Council members to structure the details of the Health Department's budget.

The Council applauds the County Board of Commissioners for including improved health as one of the four long-term benchmarks towards increasing the sense of personal opportunity, safety, and security of all County residents. This vision provides a broad perspective of healthy communities.

CBAC Report Preparation

The Health Department's Primary Care Division was accredited by the Joint Commission on Accreditation of Healthcare Organizations for Ambulatory Care (JCAHO) in November 1999. Involvement in this accreditation process has enabled the Council to have a more active role in the Health Department's financial development and review process. With the implementation of the County's MERLIN and SAP systems, we have

**Citizen Budget Advisory Committee (CBAC) Report
Multnomah County Health Department
Fiscal Year 2001-2002**

greater access to detailed financial reports that have been presented by Health Department staff at the Council's monthly meetings.

Council and CBAC members are acutely aware of the County's budget shortfall and have engaged in multiple meetings with the Department's Division Directors to gain better insight into the impact of cuts on specific programs and services as well as the overall financial health of the Department. In addition to meetings with staff, several documents were used as references in the preparation of this report, including:

- Health Department's Budget Narrative
- Health Department's Monthly Budget Reports the Community Health Council
- Health Department's CBAC Report YR 2000/2001
- *The Health of Multnomah County 2000*, Multnomah County Health Department, Office of Planning and Development
- County Auditor's *Report of Service Efforts and Accomplishment for Social and Health Services*, FY 2000
- Corrections Health Presentation 2000
- *Prevalence of Lead Dust Hazards Study*, February 2001, Multnomah County Health Department, Office of Planning and Development / Program Design and Evaluation Services and the City of Portland, Water Bureau
- *Domestic Violence in Multnomah County*, February 2000, Multnomah County Health Department's Violence Prevention Program
- Report from the Committee on Health Care Safety Net Support
- Health Department's Division Directors' Reports
- Reports by Communities in Charge
- *Coalition for a Healthy Future: Tobacco Settlement 2001 Legislative Session*

Despite the Health Department's creative efforts to maintain access to quality services, Council members are gravely concerned that the shortfall will further exacerbate health disparities within our communities.

Major Changes & Concerns

The Department established a number of priorities for developing the budget within its financial constraints and operational assets. The Council agrees that it is **critical to focus on revenue enhancement and restructuring for efficiencies and cost sharing**. Moreover, decisions must consider the **impact on access for vulnerable populations**. The following outlines the significant changes within each division of the Health Department as well as the Council's primary concerns.

**Citizen Budget Advisory Committee (CBAC) Report
Multnomah County Health Department
Fiscal Year 2001-2002**

Office of Director

As a part of the Health Department's Change Management Process as initiated by Director Lillian Shirley, many changes have been made to increase administrative effectiveness and efficiencies. For example, Lillian has established a central Director's Office that focuses on strategic external and internal planning. As a continuing redesign of the administrative and management structure of the Health Department, the Office of Organizational Development and the Communications Unit have been eliminated. The Health Department will meet the challenge of these cuts by collaborating with the County's Office of Organizational Learning and with the Public Affairs Office as well as building capacity among all staff. The Council anticipates that this partnership with the County-wide Office of Organizational Learning and Public Affairs Office will be sustainable and cost effective in the long term. The Council commends Lillian for her efforts to centralize planning efforts and acknowledges that such planning is critical to the long-term sustainability of the Health Department.

The Council has reviewed Multnomah County's 2001 Legislative Agenda and concurs with the priority placed on the Oregon Health Plan and its goal of expanding universal health care access through a prioritization of services, rather than limiting eligibility. The Council opposes measures that attempt to weaken the plan and encourages the County to support efforts that focus on the long-term stability of safety net clinics. In particular, the Council would like to draw your attention to the efforts of the Committee on Health Care Safety Net Support whose goal is to ensure that both local communities and the State support and sustain the health care safety net as an integral component of the health care system. The Committee has asked for \$26 million of the tobacco settlement dollars to support the health care safety net. The Health Department has demonstrated that local contributions combined with state and federal dollars and returned to communities in Oregon will provide and improve access to health care for those who need it through a strong safety net. This \$26 million of State support combined with \$11 million local match could generate an additional \$36.5 million of Federal support for the statewide health care safety net system. To coordinate local planning and match efforts, the committee hopes to work with the State's reorganized Department of Human Services to identify key safety net functions. The Council agrees that the work of the Committee serves to support local government partnerships and community initiatives where local funds can be matched with State and Federal dollars. The Council encourages the Board of Commissioners to support the work of the Committee and urge the Department of Human Services to establish the needed key functions to insure a stable, sustainable, and expanded health care safety net system.

Office of Planning and Development

The Office of Planning and Development provides a variety of services to the Health Department including grant development, data analysis, research and evaluation and management of department-wide community initiatives. The Council recognizes that

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funding in this Office must be sustained so that the Health Department can strengthen its own capacities and infrastructure as well as ensure Health Department programs are based on research that demonstrates quality outcomes.

Office of the County Health Officer

In January 2001, the Health Department received additional funding from the Robert Wood Johnson Foundation for *Communities in Charge*. During the last year's planning process, *Communities in Charge* has been successful in developing goals and objectives for the tri-county *Communities in Charge* project in partnership with a variety of community leaders. At the request of our community partners, *Communities in Charge* will become a tri-county effort. Currently, there are approximately 90,000 low-income uninsured people in the tri-county area. Over the next three years, *Communities in Charge* will implement a collaborative process designed to establish a new system for delivering and financing high quality, affordable, culturally competent health care for the medically uninsured and underserved populations of Multnomah, Washington and Clackamas Counties. The Council encourages and supports the Department in assuming a leadership role in increasing access for the most vulnerable members of our communities whose only resources are the safety net clinics.

Corrections Health

State law requires that inmates cannot access or utilize the Oregon Health Plan; thus, the Health Department provides acute and chronic medical and dental care to Multnomah County's incarcerated population. The incarcerated population has a higher incidence of medical and mental health problems than the general population due to life style, social economic level and neglect. Since 1994, the number of mentally ill identified at booking has increased 41%, while 80% have chemical substances in their systems. In addition, the incarcerated population is aging, requiring more expensive and continual treatments. The Council is concerned that as new jails are being built and populated, there will be a larger impact on the County's general fund in order to meet health care needs.

Dental Services

Despite the expansion of the Oregon Health Plan, there is an estimated 250,000 County residents without dental insurance. Oregon children have a higher tooth decay rate than the national average; moreover, minority children have much higher rates than the average child. Multicare Managed Dental Care Organization under the Oregon Health Plan currently has 23,000 enrollees, representing approximately 20% of those eligible in Multnomah County. The Council supports the expansion of the Dental Division early childhood cavities prevention program within the Health Department's Primary Care Services and Neighborhood Health Services Divisions.

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Fluoridation is a part of the State's current legislative session. If approved, there may be financial implications for both the County and City. The Council will stay aware of this pending legislative issue and support the Department's efforts to educate the community about the health benefits of fluoridation.

Disease Prevention and Control

The Health Department continues to respond to the emerging issues of HIV and Hepatitis C. The Council applauds the Department's efforts to integrate programs and combine service delivery to provide accessible prevention service at the individual and community level. For example, the Department has secured funding for a 4.5-year research project, *Reducing HIV and Domestic Violence Risk in Women Offenders* in order to identify whether certain interventions are of benefit for women at risk of HIV who have recently been released from jail.

Although the Council recognizes that the overall number of newly diagnosed infection rates is down for Hepatitis C and HIV, we are concerned that this may not hold true for all groups, particularly among women, heterosexuals and communities of color. We believe that this issue demands on-going vigilance.

Due to cuts in city funding, the Lead Poisoning Prevention Program will be reduced from 10.75 FTE to 0.75 FTE. In February 2001, the Health Department distributed the *Prevalence of Lead Dust Hazards Study*, which involved 125 English-speaking homes in North, Northeast, and Southeast Portland built before 1930. At the time of the study, the EPA limit was 400 micrograms in each gram of soil where a child might play. Moreover, 71% of homes in this study had composite lead dust levels that exceeded federal standards. Therefore, over 28,000 homes in the areas of the study may have indoor lead dust hazards, and over 5,800 children live in those homes and are at risk for having an elevated blood lead level from lead dust. Based on lead soil concentrations, about 8,400 homes in these areas have outdoor lead hazards and over 1,700 children are at risk from lead in bare soil. This study concludes that most of the homes built before 1930 are likely to contain lead dust levels that may be hazardous, especially to children. The Council believes that the full scope of the lead dust problem has likely not been realized due to the lack of information about lead dust in Portland homes prior to 1997. We are concerned that lack of treatment combined with cuts in prevention will become a significant emerging issue for Multnomah County. We are particularly concerned that the elimination of education, outreach and lead remediation services by the City will only exacerbate ethnic and racial health disparities.

Neighborhood Health

In order to achieve the vision of *healthy people in healthy communities*, Neighborhood Health provides health care access through home visits, groups, partnerships, community outreach, as well as in schools. The proposed cuts in the Neighborhood Health Division

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which is heavily dependent on County general funds will impact the County's ability to achieve its breakthrough benchmarks, some of which include reducing teen pregnancy, increasing access to health, mental health and substance abuse treatments, and ensuring children entering school meet developmental standards.

The most significant cut in Neighborhood Health is within Field Team Services. As proposed, the Field Teams will lose up to 16 FTE due to the revenue loss from the County General Fund, the end of large federal grants, as well as cuts in State monies. Field Teams deliver services through consultation, home visits, teaching classes, and coordination with community health providers. Many times, the member of the Field Team is the one person that clients will confide in, whether that confidence is about sex education, abusive relationships as well as other conditions in the house such as drug use. To a wide spectrum of our community, the Field Teams offer support, information, education, or hands-on training such as how to give insulin shots, do blood testing, develop nutritional plans or implement new parenting skills. Our personal experiences with the Field Teams clearly reinforce the critical role they play, particularly when an individual is newly diagnosed with a disabling or life threatening disease. Despite efforts to prioritize triage, Council is concerned that the sustainability of quality home visiting services will be diminished by these cuts, as caseloads increase and workers burn out.

The Council applauds the Health Department for responding to the elimination of the federally funded Healthy Birth Initiatives Grant by reconfiguring the NE Portland Field Office. With smart and creative thinking, partial funding was restored.

The budget shortfall has eliminated the planned opening of a new WIC office in East County and a new school-based health clinic. Residents of East County will continue to access WIC services at the Mid-County Clinic. The Council is concerned that the budget constraints will limit the Health Department's ability to respond to growing population trends and again exacerbate disparities in access.

The Council is concerned about the impact of State cuts on other programs within Neighborhood Health. For example, State cuts have resulted in a 25% reduction in the number of students/schools served by the STARS program, a key effort to educate students about the potential risks and ramifications of sex. Further, State cuts as well as grant reductions in the Breast and Cervical Cancer Program will limit the number of low-income and uninsured women over the age of forty who access screening and diagnostic services. This will also diminish the Health Department's broader educational efforts, outreach, recruitment, and partnerships with other agencies to spread the word about the need for early detection. We are concerned that lack of treatment combined with cuts in prevention will become a significant emerging issue as the population of women increases and ages.

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Primary Care

The Primary Care Division is responsible for the development of services to promote 100% access and zero disparities for the screening and treatment of illness through prevention and client education to promote healthy choices. In Fiscal Year 1999-2000, the Primary Care Division served over 52,000 primary care clients, constituting approximately 114,000 visits. Due to decreased revenue from the County General Fund, State and grant resources, Primary Care anticipated a substantial cut in its budget. Fortunately, the Health Department was able to increase Federally Qualified Health Clinic reimbursements by \$4.3 million. Revenues will also grow due to grants, productivity, payer rate enhancements and growth in CareOregon enrollment. This will allow the Health Department to cover the overall increased facilities costs without deeper program cuts. The Council is very impressed with the Health Department's determination and resourcefulness to achieve the goal of increasing revenues.

The Health Department will require additional funding of facilities maintenance and operations, including meeting new National Fire Protection Association codes, as required by JCAHO. The Council understands the necessity of meeting these costs in order to comply with JCAHO accreditation, as well as fund the new clinic facilities in North Portland and East County.

The Primary Care Division is currently working on reducing costs and improving customer service by the redesign of client visits and the central appointment system. The goal of this redesign is to reduce the time the client is in the clinic, decrease delays for routine primary care appointments and achieve at least 90% satisfaction ratings for patients, staff and providers. Currently, four clinics are participating in the redesign, with full implementation planned for June 2002. Contingent on the successful completion of the redesign, cuts to Primary Care have been restored. The Council, particularly its consumer members, applauds any efforts to increase access through the redesign of the central appointment system and encourages the Health Department to closely monitor the cost effectiveness of the redesign process. Furthermore, the Council encourages the Health Department to keep aware of population trends, including a 20% increase of non-English speaking clients.

Support Services

Support Services provides diagnostic, pharmaceutical and ancillary health services such as laboratory, pharmacy and language services. The Division has introduced several cost-saving measures to respond to the budget shortfall. For example, the Division will be co-managed by the Pharmacy and Laboratory Services Managers, reducing costs in pharmacy and lab operations. The Special Orders Section has been transferred to Business Services / Accounts Payable & Procurement to better integrate payments, procurement and purchasing functions, and the facilities and fleet management responsibilities have been transferred to the Director's Office. These measures will allow

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Support Services Division to focus on clinical functions, such as ensuring the growing language interpretation needs of our diverse community members are met.

Support Services has acknowledged the need to find new solutions to the ever-increasing costs of prescription drugs. For example, it has introduced a formulary system, begun group purchasing through the Minnesota Multistate Contract Alliance for Pharmaceuticals, accessed special "best price" national contracts, and increased revenues by billing third party payers such as CareOregon. The Council is very concerned that as these unregulated and unsubstantiated drug costs increase, prescription drugs will continue to be a long term and significant drain on the County's general fund. We recognize that this is a societal issue requiring a nationally coordinated response; however, these rising costs have a specific impact on our local communities. There is clearly a need to mobilize our communities to hold the pharmaceutical companies accountable to values of social responsibility.

Emerging Issues

The Health Department's proposed budget contains cuts that strive to minimize the impact of reduction of services on access for vulnerable populations. It has used restructuring and redesigns to improve and maintain quality of services as well as continued to expand efforts to maximize revenues. In light of the cuts the Department faced, the Council recognizes that the Department has done an excellent job in minimizing the impact of the cuts on County residents as well as staying true to Multnomah County's vision to increase the sense of personal opportunity, safety and security of all County residents. We also feel that the problem lies not within the Health Department's decision making but with the reductions in the County General Fund.

As indicated throughout this report, the Council recommends that the Board of County Commissioners remain diligent on the following emerging issues:

- The pressures on Corrections Health are growing due to increasing numbers of and age of inmates as well as increases in drug costs.
- As unregulated and unsubstantiated drug costs increase, prescription drugs will continue to be a long term and significant drain on the County's general fund.
- Racial and ethnic disparities are becoming more glaring with each cut, for example in the Lead Prevention Program, the Breast and Cervical Cancer Program and Field Services.
- The health needs of an aging population are increasing and will require chronic, long-term and specialized response services.
- Without funding stability for the Health Care Safety Net Clinics, Multnomah County residents will not have access to a stable, sustainable and expanded health care safety net system.

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- Violence is a significant problem in Multnomah County which requires a coordinated community response. In Multnomah County, one of every seven women aged 18-64 was physically abused by an intimate partner during 1999.
- Increasing environmental risks, such as contaminated water sources as well as hazardous lead levels in our homes and soil, demand advocacy and education.

To close, we thank the Chair and the Board of Commissioners for the continued opportunity to participate in the budget process. Your efforts and commitment to Multnomah County have not gone unrecognized by the Council. You have responded to a variety of health issues such as racial and ethnic disparities, school-based health clinics, early childhood outcomes and the needs of an aging population.

We also thank the Health Department's Director, Lillian Shirley, as well as the many staff who have supported the Council in its expanded role within the Health Department. We have a mutual mission to promote, protect and advocate for the health of the people in Multnomah County, and we hope that the recommendations and concerns described in this report will assist all of us in achieving healthy people in healthy communities.

Submitted following approval at the March 12, 2001 CHC meeting.

Members of the Community Health Council:

Bill Hancock, President*

Donna Sather, Vice-President*

Sandy Spiegel, Chair of CBAC*

Camelle Taylor

* Vickie Hendricks

Rosemary Sotta

Heidi Printz Milliken

Kathy Hammock

Marge Jozsa*

Japhena Hall

Shaun Wardinsky

Anne Potter

*indicates CBAC member

Citizen Budget Advisory Committee

for the

Department of Library Services

MEMORANDUM

DATE: March 14, 2001

TO: Interim County Chair Bill Farver
Citizen Involvement Committee

FROM: Library Board

SUBJECT: Library FY 01-02 Budget

PROCESS

By the ordinance that established the Library Board in 1990, the Library Board acts as the Library's CBAC (Citizen Budget Advisory Committee). We meet monthly and are briefed regularly about the budget. This report was reviewed at the March Library Board meeting.

MAJOR CHANGES

This budget represents the 4th year of the library levy and continues the expanded hours, increased book budget, and increased outreach programs approved by the voters in November of 1997. It also represents the continued commitment of the previous library levy that is now part of the permanent tax base. **The Library Board is pleased to be a part of the process to provide these fine services to the residents of Multnomah County.**

As the Library moves into the final years of the levy, this budget represents a fuller operational picture than in earlier years. Highlights include:

- All library branches are represented in this budget for the first time including three new locations: Northwest and Fairview-Columbia at full operation and North Interstate for a partial year;
- All branch buildings scheduled for renovation under the bond project are completed and open for the full year;
- One replacement building (Hollywood) will open during the year in its new location and building;
- Some major one-time only expenditures in the FY00-01 budget for building leases and tenant improvements are absorbed in this budget by increased operating costs.

We recognize that the operation of new and renovated buildings places a greater demand on the Library's operating budget.

- All technology spending, both for the new computer system as well as PCs for new branches and replacement of public PCs, is shifted to the bond.

This will complete the spending of the technology portion of the library bond. Future technology requirements will be covered through the operating budget.

- Spending on the Library's collection is maintained at 15%.

This is a major achievement of the levy and a benchmark for library services that is strongly supported by the Library Board.

- The implementation of the Library's 2000-2005 plan, *Extending the Promise*, is underway. Areas of focus in this budget request are services to Latinos through the ramping up of the LIBROS initiative and continued expansion of services to children.

The Library Board participated in the strategic planning process and fully supports the Library's efforts to continue and expand these services.

- The Library's benefits costs have increased approximately 30%.

The Library Board is concerned about this increase which seems higher than industry standard. We understand that these increases are leading to future cost containment measures on the County's part and we look forward to participating in that effort.

ADD PACKAGE REVIEW

There are no add packages in this request.

CONCERNS

The Library is approaching full operations in all locations while also approaching the end of the five-year levy. The challenge is to sustain library operations for these operational needs through the fifth and final year of the levy. Revenue reductions made in this and in an earlier budget year may have an impact on the Library's ability to provide current service levels in the final year of the levy (2002-03).

The highest priority is to maintain the commitment made to the voters by the Library and the County in the 1997 levy.

EMERGING ISSUES

None

Interim County Chair Bill Farver
Citizen Involvement Committee
Re: Library FY 01-02 Budget
March 14, 2001
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LIBRARY BOARD MEMBERS

Terry McCall, Chair
Susan Hathaway-Marxer, Vice-Chair, CCBAC Rep.
Joe Arellano
Robert Brading
Paul Bragdon
Bill Failing
Stephen Feltz

Dean Gisvold
Molly Gloss
Karen Hinsdale-Berkman
Gwen Farnham Hyland
Donna Oden-Orr
Jeffrey Tashman

Non-Departmental
Citizen Budget Advisory Committee

**Nondepartmental Citizens Budget Advisory Committee
Report and Recommendations - FY02**

March 15, 2001

To: Bill Farver,
Chair, Multnomah County Board of Commissioners

From: Multnomah County Nondepartmental Citizens Budget Advisory Committee
John Mulvey (Chair)
Helen Ellison
Bob Jones
John Shoul
Barrett Anderson

Process

The members of the Nondepartmental CBAC have met at least twelve times between October 2000 and March 2001, holding detailed discussions of budget and program issues with most of the program managers within the nondepartmental budget. These included Tom Sponsler, County Attorney; Commissioner Linn, District 1; Commissioner Naito, District 3; Commissioner Cruz, District 2; Commissioner Roberts, District 4; Becki Wherli, Elders In Action; John Legry, Citizen Involvement Committee; Amalia Alrcon-Gaddie, Metropolitan Human Relations Center; David Hudson, Vicki Poppen, & Cindy Chittende, Regional Arts & Culture Council; Suzanne Flynn, County Auditor; and Julie Neburka, Budget Office. In meetings with these guests, the NDCBAC investigated each program's effectiveness at advancing Multnomah County's goals and benchmarks as well as each program's plans for maintaining services in light of the difficult issues raised by the County's budget this fiscal year.

The committee appreciates the efforts of all of the program representatives as well as our staff-person Kathleen Todd for their help and cooperation during this process.

Committee Methodology

The Nondepartmental CBAC is responsible for reviewing the budgets of various offices and programs, including centralized administrative functions of the County (e.g., the Chair and Commissioners' Offices, the Auditor, the County Attorney), independent

agencies within the County (the Citizen Involvement Committee, the Tax Supervising and Conservation Council, the Public Safety Coordinating Council, and the Commission on Children Families and Community), and some other areas in which the funding is essentially nondiscretionary (e.g., the Business Income Tax passthrough to the East County cities, facilities costs for the State Courts, and accounting costs for various sinking funds outside the County's General Fund). The remainder of the Nondepartmental Budget is in the form of allocations to the following non-County Agencies: The Metro Human Rights Center, The Portland Multnomah Progress Board, Elders in Action, The Regional Arts and Culture Council, The OSU Extension, The Soil and Water Conservation Districts, The Food Stamp Program, and the Association for Portland Progress. The NDCBAC gave extensive attention to all these budget areas in order to best identify ways to meet the County's overall budget shortfall as well as maintain County services.

Most offices and programs within the nondepartmental budget were able to meet their constraint figure (i.e., current service levels minus 7%). Typically, this reduction was made by reducing or eliminating training, printing, office supplies, travel, and contracted professional services, while preserving employee FTEs to the greatest extent possible.

It is the opinion of the NDCBAC that all departments, offices and programs need to shoulder some responsibility for meeting the FY01 budget shortfall. The NDCBAC is concerned, however, that an across-the-board cut of 7% fails to recognize the differences between the various affected programs, and particularly impacts the smaller offices. While we recognize that all areas of the County will feel drastic impacts from these cuts, the smaller offices will find it more difficult to find administrative efficiencies at the management level. Further, the option of leaving vacant positions unfilled -often used by the larger departments -will be more difficult in an office with relatively few employees, as there are fewer vacancies at any given time and the impact of the increased workloads on the remaining staffpersons would be more pronounced. Thus if the smaller offices and programs are required to meet a rigid across-the-board constraint figure, their ability to adequately perform their basic functions can be severely impacted.

Finally, given the county's goal of providing quality service to its citizens, and in light of the current budget shortfall, the Committee feels that it is incumbent on the Board of Commissioners to take a hard look at eliminating certain programs entirely so as to ensure adequate dollars for those programs and functions that remain. The Nondepartmental CBAC suggests that this assessment be made with the following considerations in mind:

1. The centrality of the program to the basic functions of the County;
2. The program's demonstrated effectiveness at meeting the County's goals;
3. The ability of other offices or programs inside or outside the County government to fulfill the functions of the eliminated program; and
4. The ability of the program to find non-County resources to continue its work.

Recommendations

1. The proposed budgets of those programs and offices that met their constraint figures should be approved as submitted, with those exceptions described below.

2. In order to ensure its continued viability, the Citizen Involvement Committee's funding should be maintained at current levels. As discussed above, smaller offices are less equipped to meet a rigid, formulaic constraint figure. The clearest example of this is the County's Citizen Involvement Committee (CIC). In previous years, the CIC has absorbed cuts that have already threatened its ability to perform its function. To its credit, the CIC has submitted a budget that eliminates \$8,447 in spending. Although this is a small amount of money in the County's overall budget, it represents, among other things:

- A reduction in issues of *The Conduit* from 3 to 2 per year. *The Conduit* is currently the only regularly scheduled newsletter sent to the public at-large in the County, and has been extensively utilized by many departments to disseminate information to the public.
- The elimination of the 'local travel' fund. Among other things, this will mean that in the coming year, when CIC staff are required to attend to County Business offsite, they will not be reimbursed.
- A reduction in size of the CIC's offices by approximately 18%. The CIC will be required to vacate one room in their office suite. It appears that the facility managers will be unlikely to reassign this space, thus it is likely that the small amount saved by CIC will merely be shifted to the Department of Sustainable Community Development.
- Clearly, these cuts go beyond simply finding efficiencies and will impact the basic ability of the CIC to function, therefore the NDCBAC urges the Board of Commissioners to restore \$8,447 in funding to the CIC. This amount will enable the CIC to continue its work enabling citizen participation in County's decision-making processes.

3. The Board of Commissioners should eliminate funding to the Metropolitan Human Right Center, Elders in Action, and the OSU Extension Service. Although all three programs perform valuable services to the community, all have alternate sources of revenues. Additionally, there appear to be little or no clear County goals that these programs serve. In a difficult budget year, the County's first priority must be to adequately perform its own basic functions, and continued funding of these programs impacts its ability to do so. These programs, while enjoying some support, represent over \$500,000 in County general fund dollars, an expenditure that needs to be assessed in comparison to the loss of Juvenile Justice Counselors, drug treatment beds, and Assistant District Attorneys that the County is considering eliminating next year.

Citizen Budget Advisory Committee

for the

Multnomah County Sheriff's Office

Multnomah County Sheriff's Citizen Budget Advisory Committee Fiscal Year 2001-02

The Sheriff's CBAC reviewed the Sheriff's budget submission and related material for the fiscal year 2001-02. The CBAC met with Larry Aab, Fiscal Manager of the Multnomah County Sheriff's Office and reviewed summaries of budget documents. In addition, the CBAC reviewed revenue enhancements and budget reductions made by the Sheriff to meet revenue limitations experienced by the county.

The Sheriff's budget request for FY 02 provided no overall revenue growth despite an increase in costs of about 8.9%. Although the Sheriff has been able to offset about half of the shortfall with increased revenues, at this writing about \$1.7 million has been cut from Sheriff's Office programs resulting in a reduction of 21 positions. Cost increases were in the form of increased labor costs, the effects of living wage increases on contracts, and disproportionate growth in service reimbursements. When combined with budget reductions experienced in FY 2000-01 the Sheriff's Office had reduced its program spending by \$4.5 million and reduced its staffing by 45 positions. This trend is a great concern to the Sheriff's CBAC.

In developing a strategy of managing budget cuts of this magnitude, the Sheriff challenged his managers to seek innovative solutions not normally associated with traditional forms of public agency management. Non-traditional ways of increasing revenues and providing service were encouraged. Many of these ideas are still in development but suggest promise in dealing with the shortfall. The Sheriff established the following priorities as a budget strategy:

- Increase existing revenues, when appropriate, and seek new revenues for service maintenance.
- Maintenance of direct service programs such as jail beds and patrol services were the highest priority.
- Community livability.
- Maintenance of adequate infrastructure to ensure proper reporting and accounting.

The following strategies were reviewed:

- **Increase revenue from U.S. Marshal for rental of jail beds.**

The Sheriff's Office currently leases an average of 150 beds per day to the US Marshal's Office for the housing of federal prisoners. A new daily rate has been negotiated which will increase revenues by \$706,275.

CBAC Recommendation: The CBAC agrees with this revenue increase.

- **Increase revenue from Immigration and Naturalization Service (INS) for rental of jail beds.**

This revenue is based on re-establishing a rental of 70 beds per day to the INS. However, the only way this can work without reducing beds to local prisoners is to re-direct prisoners sentenced under SB 1145 to community sanctions. Currently the Sheriff houses 500 SB 1145 prisoners per day but is paid by the state for 330. By working closely with the Department of Community Corrections in reducing this over-capacity problem through alternative sanctions, sufficient beds will be made available for these rentals. This will increase revenues by \$2,900,000.

CBAC Recommendation: The CBAC agrees with this revenue increase as long as it does not displace local prisoners from the jail system.

- **Implement a new “Pay to Stay” program for inmate lodging.**

Oregon law allows the recovery of housing costs from prisoners up to \$60 per day. Jurisdictions throughout the US have had success in this cost recovery. This revenue is predicted to increase revenues by \$1,000,000 on a 10% return on inmate population.

CBAC Recommendation: The CBAC agrees with this revenue increase. However, the CBAC recommends careful monitoring of the program to ensure that it does not impose an undue economic hardship on the inmate’s families.

- **Submit funding information for State Criminal Alien Assistance Program (SCAAP).**

The SCAAP program is a federal payment program that reimburses eligible jurisdictions for costs associated with housing undocumented aliens. The Sheriff’s Office has historically received about \$300,000 per year.

CBAC Recommendation: The CBAC agrees with this revenue increase.

- **Recognize historically unspent appropriations as a budget item:**

The Sheriff’s Office normally under spends its budget by about \$3,000,000 per year. This is due to delays in hiring, unanticipated revenues, and other unspent appropriations. The Sheriff intends to designate \$1,000,000 of this under spending in order to help bridge the shortfall.

CBAC Recommendation: The CBAC agrees with this strategy. In past years the Sheriff has adopted a policy of not re-appropriating under spending for purposes of funding programs. However, the Sheriff has no intention of re-applying historical savings to program costs. A strategy of setting and predicting year-end spending limits is sound policy and not inconsistent with the Sheriff’s budget policy.

- **Program reductions:**

The Sheriff has prepared a list of program reductions that total \$1.7 million and reduce staffing by 21 positions. These reductions will reduce service levels but will not eliminate services considered high priorities by the Sheriff. Program cuts that the CBAC considers significant include:

- Elimination of YWCA Contract that provides work release services for female inmates. This service has been absorbed through MCRC.
- Elimination of MCSO participation on the multi-agency Child Abuse Team.
- Elimination of School Resource Officers in the Barlow and Reynolds School Districts (This cut was made when one time only money was removed from the Sheriff's constraint budget. It is not a part of the \$1.7 million cut).
- General decrease in program effectiveness through the reduction or elimination of value added programs such as crime prevention and citizen involvement services, staff training, inmate laundry services, etc.

- **Aggressive management of service requests.**

The Sheriff's budget includes \$12 million in service reimbursements from other county departments. This is 12.8% of the budget. Service reimbursements include such things as facility management, fleet, information systems, etc. The Sheriff has challenged his managers to reduce this cost by 3% or \$400,000. The CBAC feels that this is a good way to manage costs and we are anxious to see the results.

Emerging Issues:

During FY 02 building will begin on the Wapato Jail Facility. This facility will add 200 jail beds and 300 secure alcohol and drug treatment beds to the criminal justice system. This facility is a critical piece to the over-all success of the criminal justice continuum. However, operational funding has not been identified for this facility and the county will have to seek an operating levy from the voters in FY 02. It is critical that basic jail and law enforcement services be maintained in the FY 02 budget so as not to jeopardize the successful passage of this levy.

Member's Names

Jim Lasher, Chair	Malcolm Freund
Vera Robbins	George Kelley
Marv Woidyla	Juanita Crawford

Citizen Budget Advisory Committee

for the

Department of Support Services

Multnomah County Department of Support Services
Citizen Budget Advisory Committee

Memo

To: Central Citizen Budget Advisory Committee
Office of Citizen Involvement

From: Shannon Shoul
Department of Support Services Citizen Budget Advisory Committee (CBAC)

Date: March 19, 2001

Re: DSS CBAC 01/02 Report

PROCESS

Members of the Department of Support Services CBAC met with all DSS Divisions in February and March 2001. Janet Thompson and DSS Director Cecelia Johnson joined the CBAC for all meetings with DSS staff.

Jan. 4	DSS
Feb. 21	Information Services
Feb. 22	Human Resources, Organizational Development (COOL)
March 14	Community Business Operations, Financial Operations
March 16	Director Review

The DSS CBAC understands the seven percent, across-the-board constraint issued this year and discussed shifts and changes with each area to fulfill that budget requirement. CBAC members realize cuts could limit the effectiveness of some programs the County has significant investment in, including MERLIN and Organizational Development, as well as limits the potential of some revenue resources.

CBAC members felt that DSS staff were helpful, knowledgeable and accepting of the public participation component of the budgeting process.

MAJOR CHANGES

DSS has undergone tremendous change in 2000-01, including a new director, an updated organizational configuration, adoption of new County services including elections and

assessment/taxation, concurrent negotiations of nine union contracts and ongoing MERLIN implementation.

Given these changes and the budget constraints, the CBAC met with DSS leadership on proposed budget changes to meet the constraint. The CBAC believes the Department has made significant efforts to align its budget with the rest of the County.

CBAC Opinions

- Believes ongoing support of the MERLIN project is needed to fully realize the benefits of the enterprise system investment. Consolidation of network support and training are needed to ensure successful implementation.
- Supports the DSS reorganization and renewed focus on teamwork, encourages ongoing review of services and functions within the department for efficiencies.
- Encourages investment in training, recruitment and retention, living wage analysis, classification system review, and creation of succession planning program as County faces realities of aging workforce and increased competition for qualified employees, especially in IT, nursing and other specialized fields.
- Desires additional resources be dedicated to the profit-generating taxation function.
- Develop Web component Information and Referral line with city.
- Supports ongoing equalization of County's IT function.

CBAC Recommendations

- Develop shared grant writing resources within County to pursue funding, particularly for IT, elections.
- Consider online training courses to be bundled with PCs.
- Improve coordination across all departmental HR services to ensure County workforce mirrors County population and labor questions can better be addressed within divisions.
- Capture growth curve on learning from MERLIN project and build learning culture into County.
- Change processes for Voters Pamphlet for two key groups: overseas—provide Web-based Voters Pamphlet only or permit individuals to opt out; sight-limited—utilize Oregon Public Broadcasting's blind reader program services rather than tape production.
- Investigate options for contracting property assessment exception analysis work on a contingency fee basis, subject to doubled rebate to county in the event of a successful challenge. Consider also lobbying for legislation to broaden scope of contracting available for the function.
-

- Continue donating out-of-use computers to non profits and explore technology-based agencies that can achieve technology training objectives while rebuilding.
- Establish, with citizen input, direction for e-government and Web-based County services.
- Consider adding security goals in public bids for wireless phone use given sensitivity of some County services (Justice, health, etc). Pending cutover from TDMA to GSM provides a window to adopt a more secure, faster system. (Four countywide operators: MCI, Qwest, Sprint, Verizon.
- Seek a nonpartisan nonprofit to take over or share expense of the successful 18th-birthday register to vote cards for local high school students.
- Reconsider shift to Exchange 2000 and upgrade of other Microsoft back office products dependent on Windows 2000 servers. Reports show unexpectedly high hidden costs in migration. Other sources are more capable, scalable and secure (e.g. Solaris).
- Explore availability of news services, list serves and other no-cost information sharing tools for County employees to fill gaps in training and subscriptions budgets.
- Develop County information exchange within and between agencies by establishing a USENET newsgroup server.
- Continue support for the Tax Supervising Commission. Bringing its function in house is likely to increase costs and complexity to the public with no benefit to the public

CBAC Concerns

- Ongoing recruitment, retention needs will escalate if not dealt with immediately
- Losing opportunity for shift of culture to learning organization begun by MERLIN without proper support
- Dropping non-mandated Voters Pamphlets distances public from direct candidate information
- Lost County revenue through drop of personal property auditors (est. \$900,000)

Members:

Shannon Shoul, Chair
Donald Dumont
John Bartley III
Maureen Pung
Brian Wayson

Citizen Budget Advisory Committee

for the

Department of
Sustainable Community Development



Department of Sustainable Community Development

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To: Bill Farver, Interim Chair of the Multnomah Board of County Commissioners
Multnomah County Board of County Commissioners
Central Citizen Budget Advisory Committee

From: Tom Doyle, Chair
DSCD Citizen Budget Advisory Committee

Date: March 15, 2001

Subject: DSCD CBAC Report for 2001-2002

Process:

For the first time in several years, our CBAC retained a sizable portion of its membership from last year. As a result, we were able to spend more time concentrating on specific budget issues and less time learning about the functions of the Department. The committee held several meetings and discussed a wide range of topics. However, the committee concentrated on two areas in particular: the departmental focus on sustainability and Animal Control.

Findings:

In this report, we encourage the County to continue its emphasis on sustainability and we recommend full funding for Animal Control. In addition, we urge the County Commissioners to begin planning for significant spending that will be needed next year for bridge repair. Without county funds, there is significant risk that the county will lose out on sizable federal matching funds for badly needed bridge repairs. Our detailed recommendations follow.

1. Sustainability.

First, the County's change in the Department's focus to sustainability was an excellent decision. In our previous report, we recommended that the County rethink its county wide benchmarks to include an emphasis for DES. It appears that the County has done just that by renaming the Department of Environmental Services to the Department of Sustainable Community Development. As you know, this is more than a change in name

alone. "Sustainability" is an organizing principal which will reinvigorate morale within the department and will provide a touchstone to base funding decisions in the future. Furthermore, by focusing the Department on this organizing principle, and by moving elections and other divisions out of the Department, it is our sense that the Department will now be more able to accomplish its goals.

The committee does have concerns that the Commissioners decision to focus on sustainability should be more than mere rhetoric. The Department must be given the resources to implement green building practices, to provide leadership in the housing area, and to implement the natural step concepts into all of its activities. Without a financial commitment from the county, the new emphasis may prove to be simply a change in name alone. While well intentioned, this could result in a discrediting of the important ideas contained in the concept of sustainable development. We urge the county to follow through with funding in future years to ensure that the emphasis on sustainability is a success.

2. Animal Control

The Committee once again recommends full funding of Animal Control. It is our understanding that the Department will be proposing approximately \$150,000 in budget cuts for this primarily general fund funded program. If there is any way possible, this \$150,000 should be restored. If the cuts are implemented, the cuts will come from three areas -- reduction in a field officer position, reduction in contracted medical services and elimination of after hours services. If this amount of cut is necessary, the committee agrees that these are the best of the worst areas to cut.¹ However, the committee believes that any cuts are unnecessary, send the wrong message to the Division, and are in conflict with the County's new emphasis on sustainability.

A. Cuts are unnecessary

The Director of Animal Control has proposed a number of revenue increasing initiatives which is estimated to result in a one-time increase of \$129,000 and an estimated continuing increase of revenue of approximately \$48,000 the following years. These increases come primarily through use of a collection agency to collect unpaid fines and fees. As a result, it is very likely that the county will be seeing increased revenue entering its general fund. While Animal Control is a general fund program, we believe that the Division should see the benefits of its efforts to increase revenue and save money.

¹We also agree with the Department that, among these cuts, the first to be cut should be the 1.0 FTE animal control officer.

B. Wrong Message.

The County must realize that Animal Control is a vital general fund service. It should not be an afterthought. Rather, the County must make a commitment to fund this service. In addition, the new Director of Animal Control is making great efforts to increase revenue, to respond to critics of the Division, and to modernize the Animal Control services it provides. However, there is little incentive for this manager or for any other manager to spend time finding those efficiencies and increasing revenue if, despite success, there are significant service cuts. As a new Director in a very difficult position, the director deserves the support of the County leadership.

C. Cuts Conflict With Emphasis on Sustainability

The Committee can not emphasize enough the importance of a good quality of life to the sustainability of a city and the importance of animal control to quality of life. High density is a hallmark of a sustainable city. Not only does higher density reduce sprawl, it also reduces the cost of providing public services such as roads and water. However, as people live closer together, quality of life can decrease and as a result, high density is less attractive. It is only by reducing the minor nuisances that detract from city life that we can sustain the statewide emphasis on high density. A dog barking late at night, for example, may not seem that important, but it can result in a dissatisfaction both with the government and with the community. Animal Control provides a service that is key to having a good quality of life here in Portland. However, the cuts at issue will increase response time significantly to nuisance issues and may eliminate responses late at night altogether. In sum, Animal Control is a core part of the services the county provides and is a basic element of sustainability.

3. Bridges

The committee renews its call for a plan for funding necessary maintenance on the county bridges. It is vitally necessary that funding be allocated now to ensure that the county is able to obtain Federal matching transportation funds. Once again, the bridges are a vital part of the infrastructure of our community. The County leadership must make a commitment to its continued funding.

In conclusion, the committee thanks the Commissioners for the opportunity to be the voice for citizens in this budget process.

Submitted by:

DSCD CBAC

Tom Doyle, Chair
Tim Farley
Iris Newhouse
Ron Thrasher

Steve Murray
Michael Morris
D’Norgia Price

Assessment 2000

for the

FY 00/01 CBAC Recommendations

**FY 2001 CBAC Recommendations
Status Report**

**Office of Budget & Quality
October 19, 2000**

CBAC Recommendations Update
FY 2001

Central CBAC 00/01 Budget Report	Budget/Other Action taken
<p>Stable Funding It is to the benefit of the community for the County to have stable funding (sufficient tax base) for programs and maintaining capital investments in bridges and facilities. We are concerned about having so much of the County's facilities and operations at the frequent mercy of levy votes. Recent initiatives that have changed the tax structure have added legal constraints (maximums & compression) to the political and administrative vulnerabilities of levy-based government</p>	<p>On November 23rd Chair Stein and Executive Assistant Bill Farver briefed the Board of County Commissioners and highlighted the principles which were used to guide the budget process. Those principles are listed below:</p> <ol style="list-style-type: none"> 1. Follow the Long Term Benchmarks <ul style="list-style-type: none"> ➤ Reduce the number of children in poverty ➤ Increase school success ➤ Reduce crime 2. Cut expenditures or identify new revenues to cover the \$11.8 million deficit in the public safety system in FY 2001. 3. Departments will be asked to make selective reductions to current service levels, and not bring new decision packages for consideration. The goal is to maintain excellence in what we do, not reduce quality everywhere. 4. Observe best practices and protect areas that are providing the best return on investment including and maintaining our commitment to evaluation. 5. Maintain advances in infrastructure, including the asset preservation fee, the Strategic Space Plan and installation of the Integrated Business Enterprise System, now called Merlin.
<p>Current Programs In times of constraint budgets the County should concentrate on what it does well and fund accordingly. Adding new programs, partnerships, and services can undermine valuable ongoing efforts.</p>	<p>"Data-based decision making" continues to be a County commitment as part of the RESULTS initiative. A variety of data gathering methods have been developed over the last ten used and are widely used including: Benchmarks; performance measurement (Key Results); Service Efforts and Accomplishments Reporting (Auditor's SEA report--in process); program evaluations; customer surveys and focus groups; and employee surveys. The</p>
<p>Evaluation Efforts to improve and follow through on evaluations of all programs need to be encouraged. The CBAC congratulates Auditor Flynn's improvements of the Services Efforts & Accomplishments process and reports, and County employees as well as Chair Stein and the Board of County Commissioners on the County's recent attainment of the Oregon Quality Award</p>	

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	<p>Governmental Accounting Standards Board (GASB) selected Multnomah County as one of the first twelve sites featured as models on their new web site (http://www.rutgers.edu/Accounting/raw/seagov/pmg/index.html).</p> <p>There is so much data being collected that it has become hard to use in a systematic way. Therefore, the County Chair's Office and Budget Office are currently engaged in discussion with departments as to which of the data collected by the above methods measures attainment of:</p> <ol style="list-style-type: none"> 1. County-wide goals, e.g., the Benchmarks; 2. Departmental goals, and; 3. Monitor routine operation of programs. <p>Once this process is complete, data can be gathered into reports targeted to appropriate purposes and organizational levels.</p>
<p>SAP Project</p> <p>In order for the County to realize its investment in the Integrated Enterprise System there needs to be solid support throughout the County organization. We support the current plan for adequate training for users and continued support staffing</p>	<p>End user training took place between May and July 2000. Multnomah County also purchased on-line and classroom training tools which will supplement our in-house system and Change Management courses. Some group specific learning opportunities and Brown Bags will begin to happen this winter - in December. Other specialized one-on-one trainings are occurring on a frequent basis through out the county, on an as needed basis.</p>
<p>PERS</p> <p>The State of Oregon should take more responsibility in reducing the recent additional cost to the County of the Public Employees Retirement System. The CCBAC urges the County to make this a priority at the next legislative session</p>	<p>PERS issues are a high priority of AOC and the County has been involved with AOC in developing a legislative agenda. With local government involvement and persistence, many of the issues that caused PERS rates to increase over the last few years have been corrected by the PERS Board. Multnomah County, along with several other local governments, is presently involved in a lawsuit against PERS to address the other issues not corrected by the PERS Board.</p>
<p>Risk Mgt. Fund</p> <p>The new arrangement of budgeting County Counsel in the Risk Management Fund should be tracked closely to determine whether it is appropriate and if the charge-backs are only adequate to cover costs of the office. The CCBAC is concerned about what appears to be budgeting after the fact rather than to establish expectations and limits.</p>	<p>The Finance Sub-Committee of the Operating Council is scheduled to review the Risk Management Fund—from which the County Attorney's Office is funded—this year.</p>

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Staff Assistants

The Central CBAC is aware that there is not an established salary range nor a definite job description for the Staff Assistant position and current practices give those staff a wide range of responsibilities and an even wider range of salary levels. We realize that these employees are exempt and most report to elected officials. However, the Central CBAC feels that for the sake of budget forecasting and employee equity a study should be carried out and a salary schedule devised that accurately reflects the level of responsibility assigned to and discharged by all these employees

Multnomah County had established descriptions and ranges for this type of job about ten years ago. This was abandoned because each Commissioner had a little different way of structuring their staff duties and also had individual ideas about appropriate pay. A true personal assistant to an elected official is exempt from EEO law, FLSA, and Civil Service. This supports allowing the elected official flexibility in assignment of duties and pay. At the same time, there are issues that Human Resources is addressing to ensure that everyone that is designated a staff assistant is meeting that criteria.

Budget Office Note: *DSS-Human Resources is currently working to classify staff assistant positions in the Commission on Children, Families, and Communities, and in the Public Affairs Office. Staff Assistants working for elected officials are exempt from FLSA, and therefore will not be considered for classified service. Other offices that employ staff assistants, such as the Citizen Involvement Committee, may have their staff positions added to the classified service at a later date. Contact Ellen Ullrick at x22202 for further information.*

CBAC for ADS

The Central CBAC is concerned that the Department of Aging and Disability Services has not ever participated in the Citizen Budget Advisory Program. This is the only County department without a CBAC. The nonprofit group Elders in Action has served as such on a very limited basis and with the potential conflict of preserving their own contracts with the County. Now that this department includes Disability Services we feel even more strongly that a formal CBAC is needed. We request that the County, in consultation with the Central CBAC, Elders in Action, the Disability Advisory Committee, the Department of Aging and Disability Services, and the Citizen Involvement Committee move toward creating a formal CBAC for this department

ADS is the in process developing a suitable solution to this issue, however, no formal action has been taken yet.

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Community & Family Services CBAC Concern/Recommendation	Budget/Other Action taken
<p>Add Package Review</p> <p>"No formal add packages have been solicited at this point, discussions have taken place between DCFS staff and the Chair's Office regarding several service priority areas. Those include Domestic Violence services for the African American community and services for Homeless Families."</p>	<ul style="list-style-type: none"> ➤ The Chair's Proposed Budget included a \$58,000 CGF add package for Domestic Violence services for the African American Community. It was Adopted by the Board. ➤ A \$80,000 CGF add package was included in the Chair's Proposed Budget to backfill expiring grants for Homeless Families. The \$80,000 appropriation was removed in the Adopted budget as additional grant funding was found. <p>Other CGF Add packages and amendments included:</p> <ul style="list-style-type: none"> ➤ Increased funding for East/Mid County Family Centers (\$45,601) ➤ Provided bridge funding for mental health services in the Gresham Barlow School District (\$34,000) ➤ Added funding for family support for developmentally disabled clients (\$40,000) ➤ Provided one-time-only funding for 0.50 FTE of staff to assist with the Children's Receiving Center (\$28,785) ➤ Add funding for 25 RAP/Mentorship slots (\$100,000) ➤ Added funding for ROSS for domestic violence services for the Russian community (\$67,782)
<p>Restorations</p> <p>"Along with cuts in staffing, the department cut contracted services including, reductions to Portland Public Schools Early Intervention services, reserves for Emergency Hospital holds (E-Holds) and the Crisis Triage Center funding was reduced. The Touchstone client assistance funding was also reduced."</p>	<ul style="list-style-type: none"> ➤ Funding for PPS/MESD Early Intervention was restored (\$185,000) ➤ Funding for PEIP was restored (\$60,651) ➤ Touchstone client assistance was not reduced. ➤ The budgeted CGF cut for Emergency Hospital Holds was retained. The reduced budget, while tight, was believed to be sufficient.

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Mental Health Issue

"The Behavioral Health Division continues with its efforts to ameliorate the critical issues in the **mental health outpatient system**, caused by the adverse impacts of the Oregon Health Plan on Multnomah County. A proposal for "relief" funds has been submitted to the State Mental Health and Developmental Disabilities Services Division (MHDDSD). The funds requested, which total two million dollars for the remainder of the current biennium, would be used to shore up access to clinical care, housing support and reduction of caseloads. The funding decision is due to be made by the State in March, with program startup shortly thereafter."

The State Department of Human Resources approved the County's submission of \$937,000 of additional state funding between now and July, 2001. The funds will be targeted to paying for housing supports, consumer supports, expanded case management, crisis services and consultants to assist the Design Team in developing specific recommendations for improving our service delivery system. Community and Family Services developed the proposal with extensive input and review by the Mental Health Design Team Coordinating Committee.

A "Phase 2" proposal to spend an additional \$247,000 for family support, employment assistance, and consultant and training for service providers is being developed by County staff. "Phase 3" may involve support for data needs.

Antipsychotic Medications under SB 941

"A second proposal for funds to purchase antipsychotic medications under SB 941 is being prepared for submission to the State. These funds would help with the purchase of the new "atypical" drugs with less side effects, but which are significantly more expensive. The RFP also allows for prescriber time and for some other treatment services associated with the clinical stabilization process. It is expected that these resources will cover non-OHP clients from the mental health docket of the Community Court. This proposal is due to the State in late March. Concurrently, various coordination efforts in housing supply and staff support, and acute care resources development are continuing. It is expected that State MHDDSD will fund some portion of the "relief" funds proposal currently under review, having an immediate impact on the problems of access to outpatient care, housing support and crisis response. However, it is expect that these will be one-time-only funds, and only available until June 2001."

DCFS was notified on April 25,2000 by the State Mental Health & Developmental Disabilities Services Division (MHDDSD) of approval of the Atypical Anti-psychotic Medication Program for one time only funding in the amount of \$923,541 with a start up date effective June 1, 2000. The proposal was submitted as a collaborative effort including DCFS but also the affiliated Community Mental Health Networks of CAAPCare (Advanced Behavioral Health and Human Services Alliance), the Multnomah County Health Department, Multnomah County Sheriff's Department, Multnomah County Department of Community Justice, Providence Crisis Triage Center, and Central City Concern's Hooper Center.

The Department is contracting with the outpatient mental health provider networks and participating pharmacies to dispense the medications. A minimum of 300 uninsured psychotic clients will receive services during the 13.5 month life of the project from May 15, 2000 to June 30, 2001.

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District Attorney CBAC Concern/Recommendation	Budget/Other Action taken
<p>Financial Cuts in a Healthy Economy One of the primary concerns of the CBAC is that real cuts have to be made at a time when the local and State economies are quite healthy. In addition the County's overall financial condition is not in a precarious position according to Gary Blackmer's last overall report and Suzanne Flynn's 1999 Financial Condition Report. There is also concern about the impact of the Federal retiree issue on the County and questions were raised about why this is a County issue instead of just a State issue.</p>	<p>No action taken by the Department.</p>
<p>Neighborhood DA and Other Programs The CBAC is concerned that the DA's Office not lose the presence in the community which was built through the Neighborhood DA Program and the Community Court. These programs have done much to reduce the number of quality of life crimes which are most felt by the neighborhoods within the County. In addition the CBAC is concerned about losing progress made in the prosecution of child abuse and domestic violence. Great attention has been paid to these two areas over the last decade and the progress made needs to be expanded upon.</p>	<p>The District Attorney agrees that keeping a focus on community prosecution, domestic violence and child abuse is important. Some of these activities have been funded through grants and it will be necessary to identify local sources of ongoing funding in order to continue these programs.</p>
<p>Staffing Concerns The City appears to be adding police officers, and while there is a training period, etc., eventually there will be more arrests and more issues for the DA's Office. This is not a time to be reducing overall staff in the DA's office. Maintaining current staffing might be a plausible position for this next budget year, but a reduction of staff at this time, means that current levels of activity cannot be sustained.</p>	<p>While the DA has increased FTE from 225.32 to 233.25, an increase of 7.93 FTE, these increases are due to new grants which target specific activities. Trial Unit Support and Case Processing Assistance are not part of these grants.</p>
<p>Serious Crime While the quality of life in our community is good right now, this does not mean that the County should change its course. Many have spoken about the rate of serious crime being low and actually decreasing in some places. This is a good sign, however it does not mean the DA's Office should turn its attention elsewhere. Continued focus in this area will further reduce these serious crimes and make them a rare occurrence in our community.</p>	<p>Resources are being targeted as needed.</p>

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<p>White Collar Crime Team The White Collar Crime Team formed in September 1999 within the Property Crimes Unit focused its attention on a segment of crime that was difficult and time consuming. Such a "new" unit may be an easy to mark to be cut. However, the CBAC believes the important work this unit is performing, especially with elderly victims of fraud, should be continued. The CBAC recommended the full funding for this Unit during the FY00 budget process and continues to support this recommendation</p>	<p>Resources are being targeted as needed.</p>
<p>County Courthouse Finally, the CBAC has in prior reports raised concerns about the condition of the County Courthouse. While the District Attorney has made some progress in renovating its own space within the facility using dollars other than General Fund, the long-term outlook for the building needs to be addressed by the County. The County needs to provide adequate amounts of space for all employees and functional space for the occupants of the courthouse. Continuing to ignore this problem will only make the issues worse.</p>	<p>The County Courthouse is being looked into and continues to be included in the Facilities Management Strategic Space Plan. The most recent estimate is \$100 million for construction.</p>
<p>Unified Service Delivery The connections between the divisions and units of the District Attorney's Office are multifaceted. Although each unit may focus on a specific crime, there are often issues such as common victim, defendant, or location that call for interoffice collaboration. There are other issues, such as domestic violence, child abuse, neighborhood quality of life crimes, and youth crimes that carry over to many offices, departments, and other service organizations in the County. Strong partnerships and interagency collaborations are needed. The success of any one-system component may be linked to other units or organizations.</p>	<p>The District Attorney is continuing his efforts to link integrated services:</p>
<p>Community Based Initiatives The District Attorney's Office is working closely with other criminal justice agencies in Multnomah County to provide innovative services in the areas of drug and quality of life crimes. Collaborations are working to better meet the concerns of the community and to provide persons with addictions and mental health issues necessary services to prevent further contact with the criminal system.</p>	<p>The statistics on community courts show that these courts can be useful crime fighting tools. The DA's office should continue supporting the development and expansion of Community Courts and to continue efforts to find diversified funding sources for program expansion.</p>
<p>Employee Training The District Attorney's Office currently has a well-organized continuous education program for the attorneys. It also facilitates in-house training for the</p>	<p>Further training opportunities are being explored.</p>

Office of Budget & Quality

<p>support staff in areas of case processing and technology. Countywide training also supplements office training and has been a tremendous resource for employees. The structure of the organization has allowed specific units' employees to become experts in certain areas. There is a need in the organization to access further training in these areas of expertise to continue the learning curve for employees remaining in a unit for extended periods of time. As the organization continues to grow there is also a need to create greater consistency in the training that employees receive.</p>	
<p>Clerical Support Over the years the balance between support staff and attorneys in the office has varied. The District Attorney's Office currently has 46% attorneys and 35% clerical assistance as part of its general fund. Personnel and monetary efficiency is what drives the interest in maintaining an effective balance in support staff and attorney numbers. During 1999 the District Attorney's Office underwent an Organizational Assessment. During this Assessment it was common for employees to express difficulties maintaining an efficient balance and an interest in clearer role definitions. As technology has changed, the demands on workers have changed. Now, some staff have adopted new procedures based on technology advances and others have not. It is these sorts of issues that cause the Office to continually look at how technology creates a shift in work roles. Efforts to obtain alternative funding have not resulted in many opportunities for support staff positions. The Office will continue to look for new funding opportunities for the support staff. In addition it will also continue to evolve the roles of our staff with changing technologies.</p>	<p>No action taken.</p>
<p>Community Justice Department CBAC Concern/Recommendation</p>	<p>Budget/Other Action taken</p>
<p>Cost Analysis of Central Administration A cost analysis is needed to determine whether centralized administration is cost effective. (This was also a concern last year.)</p>	<p>With the implementation of SAP an analysis of administrative costs becomes more feasible. SAP contains no historical data, and as such DCJ will have to collect additional data (through time) in order to conduct an analysis.</p>

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Linking KRM's to Benchmarks The department appears to be making progress toward linking key results to Benchmarks. (This was also a concern last year.)	DCJ has linked key results to Benchmarks.
Redesign Issues We believe the department is on the right track with the redesign, but the NCCD study results were inconclusive. The study indicated increased rates of recidivism which raises questions about the effectiveness of the redesign.	An National Institute of Justice grant has been awarded to update the first evaluation performed by NCCD. Recidivism data should be more reliable because there will be a longer time period to study.
Performance Measures for Programs and Contracts Continue developing objectives and effectiveness measures for programs and contracts.	These are continuing; the RMS Division has an action plan to continue work in this area during FY01.
Information Technology SPIN and JIN Information Technology efforts should be continued.	These are continuing.
Budgetary Cuts Impact Services Reductions this year are cutting services provided to communities. Over the years most of the fat in the department has been eliminated in previous cuts.	No action taken.
Web Access for Citizens Access to the web site for citizens to have a better understanding of the system.	http://www.co.multnomah.or.us/dcj/
Citizen Information Increase understanding of the Juvenile Justice Department and the Courts.	http://www.co.multnomah.or.us/dcj/jcj.html
Citizen Information Increase awareness of services and agencies available in the community.	http://www.co.multnomah.or.us/dcj/programs.html
Citizen Information Provide information on how parents can connect with the system to help their children.	http://www.co.multnomah.or.us/dcj/jcj.html
Transitions Evaluation Evaluate Secure A/D program for effectiveness prior to construction of 300-bed facility at Rivergate.	The County's central Evaluation and Research Unit is currently conducting an outcome evaluation; DCJ evaluation staff are conducting an implementation evaluation.

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Early Intervention The committee supports early intervention at all levels in the organization. Early intervention and prevention are cost effective for taxpayers, reduce criminal activity, and improve quality of life for offenders, their families, and the community.	These are also the priorities of the Department.
SAI Evaluation The committee would like to see how effective the School Attendance Initiative is and results from the Department's participation with Portland Public Schools.	Evaluation data and annual reports will be shared with the CBAC members.
Departmental Focus More focus on early intervention, transitional services, school attendance, and family functioning. Continue strengthening partnerships within the community.	These are also the priorities of the Department.
High Risk Pupils Continue to work with school counselors to identify the high risk pupils who, if provided services, may be diverted from the criminal justice system.	Juvenile probation counselors now have their offices located within two schools.
ACJ Redesign The committee supports the ACJ Phase II redesign with continued evaluation of it's effectiveness	This is also a priority for the Department.
Transitional Services Unit The committee is supportive of the continued development of the Transitional Services Unit as another example of preventive services the department provides.	This is a priority for the Department.
A&D Treatment for Juveniles This CBAC supports the need for a full range of alcohol and drug treatment options for juveniles.	This is a priority for the Department.
Family Unit We support the formation of a Family Unit within the Department to identify and develop common approaches to dealing with families who are involved with both the adult and juvenile sides of the department.	This is a priority for the Department.

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Department of Environmental Services CBAC Concern/Recommendation	Budget/Other Action taken
Reduction Temporary Services Reduction in Contracted and Temporary Services Will Place a Greater Burden on Current County Employees	Overall service reductions to customers were not anticipated as a result of the FY 2000 budgetary reduction in professional services. The greatest changes came as a result of reductions in carryover contracts or in a reduction of forecasted revenue tied to the Pet Food Tax. In operational organizations, the reductions occurred across several organizations and represented incremental decreases in proposed training contracts, consulting or specific project related services.
Adequate Funding of Infrastructure The Commissioners Should Emphasize Adequate Funding of Infrastructure	<p>The Facilities and Property Management Division is involved in supporting the infrastructure of County assets used to provide the services that are focused on the 3 key benchmarks. To better support the facilities used to provide external services, FPM has established an asset preservation program to maximize the service life of existing facilities. FPM is in the process of conducting building audits to align projected asset preservation requirements with actual building conditions to establish needed capital improvement projects based upon limited funds available.</p> <p>The long term funding of transportation infrastructure, especially the Willamette River Bridges capital program, received extensive discussion during the FY 2000 DES Budget Hearings. Commissioners were told that there was a shortfall of \$ 4 - 6 million of County funds through federal FY 2003 to match federal funding secured by the Bridge Program. Subsequent to that discussion, the Transportation Division has reduced the scope of the Bridge Program and successfully negotiated with the state to contribute approximately \$1.8 million through federal FY 2003. These changes have reduced the shortfall to approximately \$2.4 million. Negotiations with the City of Portland are underway to provide additional local funding for the Bridge Program through an innovative partnership that would increase revenues from</p>

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	<p>traffic violations. If successful, this partnership could generate as much as \$600,000/yr., although it would be some time before the full level of revenue is generated. Despite these efforts, a considerable shortfall in local funding remains to match federal funding over the next 3 – 5 years. Looking long term, the gap continues to grow between annual projected revenue and Bridge Program costs .</p> <p>The Transportation Division is working with Regional transportation partners to pursue long-term sources of revenue for both roads and bridges. The Regional effort is being carried forward on a number of fronts including METRO and a public/private leadership initiative referred to as the "Transportation 2000 Summit".</p>
<p>Pet Food Tax The Pet Food Tax is a Worthwhile Idea</p>	<p>Implementation of a Pet Food Tax in Multnomah County was under consideration during 1999. After several months of research and development on the idea by the Department, the Pet Food Tax proposal became less acceptable to the County and the public. This funding idea is not currently under consideration by the County.</p>
<p>Health Department CBAC Concern/Recommendation</p>	<p>Budget/Other Action taken</p>
<p>2001 Legislative Session We encourage the County to prepare actively for the legislative session. It is not too soon to start. We found that in 1999 we were reactive rather than proactive in dealing with legislative issues.</p>	<p>Multnomah County Health Dept. has initiated an active legislative workgroup, working on process and legislative priorities for the 2001 session. Development of a Health Dept. work plan for the pre-session/2001 session is underway.</p> <p>The purpose of this workgroup is to assist the County's Public Affairs Office during the legislative session in determining how measures impact the Health Dept., review of bills and analysis for 2001 session. The workgroup will coordinate/communicate legislative priorities with the Community Health Council legislative subcommittee, Countywide Issues Advisory Group, Association of Oregon Counties (AOC), Coalition of Local Health Officers (CLHO) and the Oregon Health Division.</p>

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Increasing Drug Costs

The ever-increasing cost of drugs is a financial concern, tempered by the positive health effects they can produce. This is a problem faced by the entire health care system.

In order to manage the effects of increasing drug costs, the Health Department is a member of a multi-state purchasing coalition, which continuously monitors drug costs and takes advantage of quantities of scale to reduce costs. In addition, we are undertaking a comprehensive review of policy and procedures related to pharmacy in the corrections division to inform us of any potential cost savings in the methods we use for dosing. We also use a formulary of routinely allowed drugs (which has an exception process for non-formulary drugs) and uses generic brands to contain costs. We also work closely with CareOregon to contain costs.

Managing Change

There is an incredible amount of change going on in the Department at this time. We have had to deal with this ourselves, as our long time staff liaison retired. We understand that there are many key departures and retirements. The Department has achieved JACHO accreditation after an enormous effort. The County is installing MERLIN, and the Department will be installing a new health information system. We caution the Department to take care of itself.

A significant part of the Health Department's change management process to bring RESULTS to the Health Dept., Renewal2000, has become acknowledging that there is a lot happening at once and to try to minimize stress on the organization. The Department Senior Leadership Team has discussed this with the Mid-Level Managers group in an attempt to reduce/minimize adding new initiatives. One role of the new Cross Functional Leadership Team will be to develop a database of "what's going on across the Department" to help better coordinate and schedule department wide initiatives with division activities.

The Department is starting to develop a rewards and recognition process in conjunction with Chair's Stein's program. We will also be planning a department wide One-Year Renewal2000 – Renewal 2001 Kickoff celebration.

Key positions have been filled and a process for 'making the leadership change' has been designed to help staff and new leaders navigate the transition.

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Library's CBAC Concern/Recommendation	Budget/Other Action taken
<p>Operational Budget Obligations Due to Branch Renovation Project.</p> <p>Costs will grow more rapidly than anticipated revenues. The opening of renovated branches and the new Fairview-Columbia branch will impact the operational budget in future fiscal years. The highest priority is to maintain the commitment made to the voters by the Library and the County in the 1997 levy.</p>	<p>The Library agrees with the CBAC concerns and is also committed to keeping the promises made to voters</p>
Sheriff's Office CBAC Concern/Recommendation	Budget/Other Action taken
<p>Cut funding for the Police Athletic League (PAL) Assistant Director.</p> <p>This position has been funded by the Sheriff's Office for about eight years and will reduce the administrative capabilities of the program. The CBAC agrees with this reduction.</p>	<p>The Chair restored this cut in her Executive Budget. The Sheriff's Office is working with PAL to ensure program goals are met and reported.</p>
<p>Cut School Resource Officers from Barlow and Reynolds High Schools</p> <p>The CBAC agrees with this reduction. However it is strongly urged that this reduction receive a high priority in renewed funding or other alternatives be explored such as local jurisdictions assuming the program, grant funding, or shared cost between the school district and the county.</p>	<p>These positions were restored in the Chair's Executive Budget. MCSO is working with both school districts to identify opportunities to share costs.</p>
<p>Cut Gresham Temporary Holding Facility</p> <p>The CBAC agrees with this reduction. However it is strongly urged that the county explore a partnership with other jurisdictions to share the cost of the temporary holding facility. The CBAC feels that this is a partnership that would be cost effective for all jurisdictions involved.</p>	<p>This program was restored in the Chair's Executive Budget.</p>
<p>Cut agency's participation in Youth Gang Activity Team</p> <p>The CBAC agrees with this reduction. However we urge the Sheriff to maintain some sort of liaison with the YGAT in order to remain informed on gangs and gang activities.</p>	<p>The Sheriff's Office has maintained a good working relationship with all of the law enforcement agencies in Multnomah County. The relationship has weakened because of staffing reductions. However we are doing the best we can with resources available.</p>

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<p>Reduce Alcohol and Drug Treatment Program The CBAC agrees with this reduction. We also understand the value of a good alcohol and drug program within the jail and suggest that strong partnerships be put in place with the Department of Community Justice and other A&D providers to ensure treatment of in-jail offenders. In absence of effective partnerships, the CBAC recommends this program be restored.</p>	<p>The former manager of the IJIP program was promoted into a program manager position and put in charge of inmate programs. Part of her duties is to redesign the counseling programs to make the inmate programs more efficient and provide a wider array of services to inmates. As a part of that task, the program manager is working with other providers of alcohol and drug programs to take full advantage of program opportunities available.</p>
<p>Department of Support Services CBAC Concern/Recommendation</p>	<p>Budget/Other Action taken</p>
<p>SAP Implementation Risks Full benefits of such a system are dependent on reviewing and redesigning most of the core functions of the County. If the new system is simply overlaid on the existing structure and functions, the benefits will be limited. Extensive training is necessary, but not sufficient to accomplish this level of change. Management commitment and constant attention is also required.</p>	<p>The Mission statement from the SAP Project Charter is, <i>"To implement an Integrated Enterprise System that will be an information foundation to serve Multnomah County employees and citizens with data that will make us more effective and processes that will make us more efficient."</i> All of Multnomah County's high level business process were incorporated into the scope of the project and critical success factors were identified. Some of those success factors include: Commitment from senior management, Strong project management leadership, Quick decision making structure, Adherence to scope and schedule, Adequate staffing with the right people, Understanding the organizational learning curve, and Communication. Risks identified by the CCBAC had already been incorporated into and addressed by the project plan. The county has also developed Project Success Measurements.</p>

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<p>Planning for Mainframe Usage The MERLIN system is based on a new (to the County) technical infrastructure. This creates the opportunity to plan for possible changes in the future. In particular, the mainframe computer based network will be supporting only a fraction of its former workload, after MERLIN is functioning. The planning for future use of the mainframe or its replacement begin immediately.</p>	<p>There are 3 major mission critical applications still on IBM mainframe computer. ISD is currently in the process of evaluating the future of those applications and whether meet they business needs of Sheriff, District Attorney and Health Department. Currently, the number of active user accounts for those department's applications total approximately 5,700. SAP active user accounts total 1,200. Once the evaluation is complete, we will know whether or not we must maintain the IBM platform for those applications. At that point, we'll also know what the most efficient and cost effective option will be (i.e. downsizing or re-deploying it as a server for county's data warehouse). The decision to streamline the County's technical platform is anticipated to be made in the March 2001 timeframe.</p>
NON-Departmental CBAC Concern/Recommendation	Budget/Other Action taken
<p>Public Affairs Office Add #1: The CBAC recognizes the need for technical support for Web and MINT sites Countywide and recommends approval of the \$74,781 for a Web Designer. Add #2: The CBAC recommends approval of the \$65,064 for an additional Public Affairs Coordinator.</p>	<p>Neither add package was approved. <i>Note: Contained within one of the add packages was a small amount (\$10,000 or so) to cover anticipated expenses (travel, increased telephone use, etc.) for working with the Legislature during the 2001 Session. Since the adds were not approved, the PAO budget is likely to be short unless some budgetary action is taken during this fiscal year.</i></p>
<p>Metropolitan Human Rights Center The CBAC approves approximately \$10,000 needed to reclassify the Clerical position funded by the County. We recognize that this FTEs responsibilities have increased over the past year. It is our opinion that this FTE should remain a County employee.</p>	<p>This add was not approved. <i>Note: as the MHRC has moved into the Office of Neighborhood Involvement, issues and questions about our employee's appropriate job duties have arisen. The Budget Office encourages transfer of this position to the City in FY 02.</i></p>
<p>Citizen Involvement Committee The CBAC recommends approval of \$10,000 to replace funds used from Materials and Services to provide the additional required COLA.</p>	<p>This add was not approved.</p>
<p>OSU Extension In light of the County's current budget situation the CBAC is not recommending funding the \$40,000</p>	<p>This add was not approved.</p>

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<p>needed to replace the Federal dollars lost in support of the Extension 4-H Youth Development Program.</p>	
<p>County Counsel The CBAC does not support the \$60,000 requested to fund the recommendations from a comparability pay study of compensation levels for government attorneys.</p>	<p>This add was funded at \$32,819, the amount needed to increase the salaries of those attorneys at the top of the range.</p>
<p>County Counsel The County Counsel's Office and budget has grown substantially over the past several years. It is the CBAC's hope that this trend will not continue.</p>	<p>Budget Office Note: The Operations Council is scheduled to review the Risk Management Fund—from which the County Attorney's Office is funded—this year.</p>
<p>Staff Assistants The CBAC feels that for the sake of budget forecasting and employee equity a study should be carried out and a salary schedule devised that accurately reflects the level of responsibility assigned to and discharged by all these employees.</p>	<p>Budget Office Note: DSS-Human Resources is currently working to classify staff assistant positions in the Commission on Children, Families, and Communities, and in the Public Affairs Office. Staff Assistants working for elected officials are exempt from FLSA, and therefore will not be considered for classified service. Other offices that employ staff assistants, such as the Citizen Involvement Committee, may have their staff positions added to the classified service at a later date. Contact Ellen Ullrick at x22202 for further information.</p>
<p>Budgets Smaller organizations do not have the flexibility when it comes to covering additional costs within a current service level budget. The County should keep this in mind as internal and mandated costs increase and relax its policy when warranted.</p>	<p>Budget Office Note: The Budget Office recommended during the FY 01 budget process that small agency budgets be prepared according to general constraint guidelines, and reviewed for extraordinary requests on an annual basis.</p>
<p>MHRC The CBAC concurs with MHRC that a tracking system needs to be in place in order to know the origin and resolution of calls received. This information will help staff to balance workload and provide the basis for future funding issues.</p>	<p>Budget Office Note: This concern is related to the assignment of duties to our employee working at the MHRC. It is the Budget Office's opinion that this position should be transferred to the City in order to simplify funding and management problems.</p>

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<p>County Counsel in Risk Mgt. Fund Including the County Counsel in the Risk Management Fund is new and should be tracked closely to determine that placement in the fund is appropriate and that the charge-backs are adequate to cover costs of the office and also equitable for the various offices and departments. Policymakers dealing with the County's budget should take care to be no less prudent in spending from the Risk Management Fund than when spending from the General Fund.</p>	<p>Budget Office Note: See above.</p>
<p>Metropolitan Human Relations Center, the Regional Arts and Culture Council, and Elders in Action Surrounding counties should also provide funding for the services provided to them from these organizations. A "Fee for Service" Program should be looked at seriously.</p>	<p>Budget Office Note: These agencies are separate from the County and may seek funding wherever they choose. It is a policy choice on the part of the County to provide funding for these agencies.</p>

**CENTRAL CITIZEN BUDGET ADVISORY
COMMITTEE**

**DEDICATED FUND
REVIEW
2000/2001**

**Multnomah County District Attorney's Office
Department of Community Justice
Multnomah County Sheriff's Office**

Multnomah County Citizen Involvement Committee
2115 SE Morrison Street - Portland, Oregon 97214
503-988-3450

Central Citizen Budget Advisory Committee

M'Lou Christ - Chair
Shannon Shoul - DSS CBAC
Susan Oliver - DCFS CBAC
Tom Doyle - DSCD CBAC
Sandra Spiegel - DHS CBAC
Susan Hathaway-Marxer - DLS CBAC
Mark Jones - DJACJ CBAC
John Mulvey - ND CBAC
Douglas Montgomery, Ph.D., - DCFS & CFC CBAC
Vera Robbins - MCSO CBAC
Jim Lasher - MCSO CBAC
Dick Wegner - MCDA CBAC
Fran Landfair - ADSD CBAC
Roy Chapman - ADSD CBAC
Bill Hancock - DHS CBAC
Tim Farley - DSCD CBAC
Kathleen Todd - CIC Staff

Dedicated Fund Review Sub-Committee

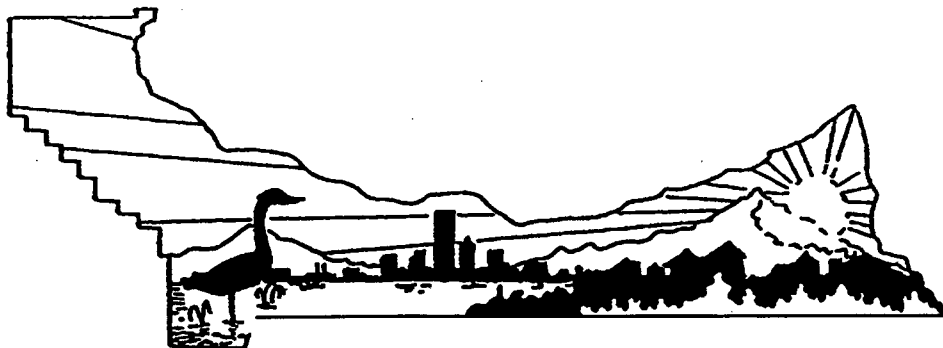
M'Lou Christ - Chair, Central CBAC
Dick Wegner - MC DA CBAC
Susan Oliver - DCFS CBAC
Vera Robbins - MCSO CBAC
Malcolm Freund - MCSO CBAC
Bill Hoffstetter - DJACJ CBAC
Fran Landfair - ADSD CBAC
Jack Pessia
Kathleen Todd - CIC Staff

Central Citizen Budget Advisory Committee

Dedicated Fund Review Recommendations 2000 - 2001

Public Safety Funds

**Multnomah County District Attorney's Office
Department of Community Justice
Multnomah County Sheriff's Office**



Multnomah County Citizen Involvement Committee
2115 SE Morrison Street - Portland, Oregon 97214
503-988-3450

Dedicated Fund Review 2000/2001

The Central Citizen Budget Advisory Committee has reviewed the dedicated funds of the Multnomah County Department of Community Justice, Sheriff, and District Attorney as directed by resolution 88-86 adopted May 26, 1988.

The resolution provides that these funds be reviewed by the Central Citizen Budget Advisory Committee every four years to determine if the purpose for which the fund is dedicated is being met, whether the level of funds is reasonable for the purpose, and whether the need for the fund has increased or decreased.

The Central Citizen Budget Advisory Committee has reviewed the following funds for the 2000/2001 budget year.

- Jail Levy Fund 169 (Separate reviews of the Department of Community Justice and Multnomah County Sheriff's Office portions of this fund were conducted)
- Inmate Welfare Fund & Community Detainer/Resident Welfare Fund 168 (Separate reviews of the Department of Community Justice and Multnomah County Sheriff's Office portions of this fund were conducted)
- Justice Services Special Operations Fund 180
 - Criminal Fees 6150
 - Alarm Permit Fees 4124
 - Concealed Handgun Permit Fees 3150
 - Marriage License and Conciliation Fees 3021 & 4850
 - Forfeiture & Video Lottery Fund 6150 (Separate reviews of the Department of Community Justice and District Attorney's Office portions of this fund were conducted.)
 - Liquor Control Fund 6102
- Emergency Communication Fund 151
- Justice Bond Project Fund 230

Methodology

The Dedicated Fund Review Committee (DFR) was made up of volunteers from Multnomah County Citizen Budget Advisory Committees (CBACs) and

interested citizens. Members were M'Lou Christ, Chair, Central CBAC; Susan Oliver, Department of Community & Family Services CBAC; Bill Hoffstetter, Department of Community Justice CBAC; Dick Wegner, Multnomah County District Attorney's Office CBAC; Malcolm Freund and Vera Robbins, Multnomah County Sheriff's Office CBAC; Fran Landfair, Department of Aging & Disability Services CBAC; and Jack Pessia, citizen.

The DFR Committee interviewed the following persons and received budgets, financial reports and narrative information on the purpose and activity within these funds over the past three years: Larry Aab, Tim Moore, Pieter Van Dyke, Michelle Hoppel, Mary Ann Ingesby, Sgt Brett Elliot, Deputy Sue Gates, and Sgt. Lane Sawyer from the Multnomah County Sheriff's Office; Shaun Coldwell, Joan Martin, and Sharon James from the Department of Community Justice; Scott Marcy and John Bradley from the Multnomah County District Attorney's Office; and Dave Boyer from the Finance Division with the Department of Support Services.

The findings and recommendations of the Dedicated Fund Review Committee (DFR) were reviewed and endorsed by the Central Citizen Budget Advisory Committee.

General findings:

The DFR Committee found the funds to be well managed. The funds are at an acceptable level and no major changes are required currently. The Multnomah County personnel interviewed were very helpful during the review process.

These funds have internal controls in place and are audited regularly.

General recommendations:

1. Emphasis should continue to be placed on preventive criminal justice programs, as well as alternative programs in the areas of jails and community corrections. Support of diversion and follow-up/monitoring programs are recommended because these provide cost savings by reducing arrests and diverting individuals from County defense, prosecution, and incarceration resources.
2. For many of the funds reviewed, a portion of the fund was intended to be spent on specific crime prevention programs such as drug and alcohol rehabilitation, continuing education, and job skill programs. We again recommend that the portion of these funds earmarked for specific programs continue to be tracked not only to assure that the

intended monies are spent on the appropriate programs but also to determine the success or failure of these programs through the collected evaluation data.

3. In order to stretch available funding for these programs, the DFR strongly recommends that the Department of Community Corrections continue its partnership connection with Portland State's Capstone Program. We also encourage the Multnomah County Sheriff's Office, the Multnomah County District Attorney's Office, and other County Departments to look into these potential partnership resources. Undergraduates and a supervising professor are available to study problems, and offer recommendations, and offer technical assistance in exchange for the opportunity to fulfill graduation requirements.
4. The DFR Committee again recommends that more emphasis be placed on publicizing the successes and value of programs within the justice system.
5. Fee for Service options should be explored where applicable with the recommendation that careful monitoring should take place to ensure that no undue hardship results for the clients or their families.

Specific recommendations:

Jail Levy Fund 169

The voters established a Jail Serial Levy in 1989 and 1993 for the operation of the Inverness Jail and for alcohol and drug treatment beds. In 1996, the Levy was renewed and the Restitution Center was increased from 120 to 160 beds. Technically there is no dedicated fund for the 1996 Public Safety Levy due to the passage of Measure 50 that folded the 1996 Levy into the General Fund where there is no legal mandate on spending.

Department of Community Justice Portion of Fund 169

A portion of the Levy is allocated to the Department of Community Justice for drug and alcohol treatment programs.

Findings:

The Department of Community Justice tracks the expenditures as if this operated as a dedicated fund.

The DFR Committee continues to consider these programs to be important alternatives to incarceration.

Recommendations:

1. The value and benefits of these programs should be compared with the County cost of beds in a correctional facility.
2. The County should publicize information on the success rate for its drug and alcohol programs and link that information to the need for continued funding of these programs immediately before and when the County requests a new Public Safety Levy in 2002 or 2003.
3. The department should track how the reduction of Alcohol & Drug beds from 70 to 50 impacts the program and use the results as part of any program evaluation related to funding practices.
4. The DFR continues to recommend parenting classes for both male and female clients.
5. The DFR understands the value to the public of tracking these expenditures as if this were a dedicated fund. We recommend that the review be on a yearly basis through the Citizen Budget Advisory Committee for this department.
6. We recommend that a continuing, stable source of revenue for this program should be developed rather than depending on levy renewals.

Multnomah County Sheriff's Office Portion of Fund 169

The portion allocated to the Multnomah County Sheriff's Office operates approximately half of the County's jail beds.

Findings:

The Multnomah County Sheriff's Office tracks the expenditures as if this operated as a dedicated fund.

Approximately \$39 million will be needed by the Multnomah County Sheriff's Office for jail bed operations in FY 01/02.

Recommendations:

1. A continuing, stable source of revenue for this program should be developed rather than depending on levy renewals.
2. Staffing levels should be expanded and monitored to ensure appropriate levels and to eliminate overtime expenses and to reduce associated understaffing risks to inmates, corrections personnel, and the public.
3. Video arraignments should continue to be used to the maximum extent possible in order to keep transportation costs down and promote improved safety practices for the public.
4. Staff should continue to develop programs that provide offenders with education, training, and to increase necessary daily living skills to reintegrate back into the community successfully.
5. Cost effective programs such as house arrest, diversion and pre-trial release should be identified and publicized in order to inform the public about the true costs, benefits, and savings provided by alternatives to incarceration.
6. The DFR understands the value to the public of tracking these expenditures as if this were a dedicated fund but recommend that the review should be on a yearly basis through the Citizen Budget Advisory Committee for this department.

Inmate Welfare Fund 168

The Board of County Commissioners by Ordinance established the Inmate Welfare Fund on September 22, 1988, to account for the purchase and sale of commissary items to inmates of County correctional facilities.

Multnomah County Sheriff's Office Fund 168

The Multnomah County Sheriff's Office portion of the Inmate Welfare Fund is actually a trust fund set up to account for the purchase and sale of commissary items to inmates of Multnomah County's correctional facilities. The profits from these sales and revenues from pay phones provide both essential items for indigent inmates and recreational and educational items for the general inmate population.

Findings:

Items are sold at current retail market value. Any profit provides for essential items for indigent inmates and purchases recreational and educational items for the inmate population. An Inmate Welfare Safety Committee whose members include corrections personnel oversees purchases. Pay phones continue to add to the revenue in the fund. This fund runs at a profit and is reconciled each month.

Recommendations:

1. Inmate input should continue to be sought in the selection of commissary items, equipment, and educational materials purchased with these funds.
2. Staff should look for ways to measure successes and to publicize the positive outcomes of the various programs that Corrections runs for the offenders.
3. Profits from the fund should continue to be used for essential items for indigent offenders and for recreational and educational items for the inmate population such as the continued maintenance and periodic upgrades of the computer system.
4. The DRF Committee again notes discomfort with the use of "Welfare" in the title name of this fund and suggests changing it to the Commissary Fund.
5. An alternative use of these revenues might be to support inmate drug and alcohol programs. This alternative and its costs/benefits should be explored.

Community Justice Detainer/Resident Welfare Fund 168

Revenue for the Community Justice portion of the fund is generated from detainee telephone service for both Interchange Treatment Center and the Juvenile Justice Complex. AT&T forwards this revenue generated by the operation of the phones at each location into the fund. Fines for unacceptable client behavior also go into this fund. The fund uses these monies towards purchasing everyday items such as: books, learning materials, clothing, and special hygiene needs.

Recommendations

This fund should continue to be used towards the purchase of educational and hygiene items to meet needs of the detainees in the Juvenile Justice System.

Justice Services Special Operations Fund 180

This fund was established in the 1993-94 budget to account for revenues previously placed in the General Fund that are dedicated to Justice Services in the Community Justice Department, the Multnomah County District Attorney's Office, and the Multnomah County Sheriff's Office.

Findings:

This fund accounts for probation fees, criminal processing assessment fees, conciliation court fees and marriage license fees for the Community Justice Department. This fund accounts for revenues received from forfeitures and video lottery for the Multnomah County District Attorney's Office. This fund also accounts for the Multnomah County Sheriff's Office revenues received from forfeitures, alarm permits, concealed handgun permits, gun ordinance fees and liquor license fees collected for civil processing inspection.

This fund appears to be properly managed. Staff for these funds was both knowledgeable of the funds and able to explain details. Internal controls are in place according to recent audits.

The DFR Committee chose several of the funds contained within the Justice Services Special Operations Fund 180 to review in detail.

Criminal Fees 6150

Criminal fees assessed by the state courts are collected by the court system and transferred to the County. The County's intergovernmental agreement gives 15% of this revenue to the General Fund of each jurisdiction.

Findings:

In Multnomah County these funds are used by the Department of Community Corrections for the (1) Women's Transitional Services program which provides drug and alcohol intervention and treatment and case management to pregnant, drug-addicted female offenders and their children,

and (2) the Pre-Trial Release Supervision Program which provides intensive non-custody supervision for those individuals the Court feels cannot comply with recognizance release.

Offenders needing these services are increasing in number. The fees do not cover the full cost of these programs. General Fund monies are used to cover the shortfall.

Recommendations:

1. Continue funding the Women's Transition Unit to enhance drug and alcohol intervention and treatment and case management programs.
2. Continue funding the Pre-Trial Release Program.
3. Programs that prove to be cost effective through lowering the recidivism rate should be publicized in order to inform the public about their costs/benefits and savings.
4. The County should seek increases in the amount of the shared fine levied by the state courts for various crimes. Costs to the County have increased since the original percentage shares of revenues were set.
5. The percentage of revenues transferred to the County needs to be increased. The County should work towards changing the percentages to reflect the actual costs of the programs these fees help support.

Alarm Control Fund 4124

The Board of County Commissioners through ordinance established the Alarm Control Fund in 1975. This fund comes from permit fees for home and business burglary alarm permits and from false alarm fines.

Findings:

The fund is used to operate the alarm permit office and the "profit" is allocated to the General Funds of the seven participating jurisdictions within Multnomah County. While the program is administered by the Multnomah County Sheriff's Office, a consortium made up of the seven jurisdictions makes policy

The Alarm Unit receives approximately 2,000 calls per month from citizens requesting information on false alarm issues. The program is completely computerized and the clerical staff processes more than 132,000 pieces of mail a year.

Recommendations:

1. The County should continue educating the public on measuring the success and value of the Alarm Ordinance Program, especially in the issue area of decreasing false alarms with the resultant savings of police time and resources.
3. The DFR Committee continues to support a needed raise in fees for this program as discussed by the Alarm Ordinance Task Force in 1998. The added revenue should be returned to the seven jurisdictions that provide police response to alarms.
4. The DFR was pleased to learn that the Alarm Unit is now totally computerized and recommends that this office continue to keep current on computer technology.

Concealed Handgun Permit Fees 3150

The Board of County Commissioners in response to 1990-91 legislation regulating gun purchase and concealed weapons permits established the Concealed Handgun Fund. The fees and regulations are mandated by the State of Oregon as stated in Oregon Revised Statutes 166.291, 166.292, 166.293, and 166.295.

Findings:

This fund collects fees from persons wanting to purchase a handgun, take training, or have a concealed weapon permit. Fees are used to pay the cost of the Concealed Handgun Licensing Unit. Revenue is on a 4-year cycle that matches renewals. This cycle accounts for shortfalls matching the renewal cycle. Since fees have not changed with the inception of the regulations concerning concealed handguns the unit is not self-supporting and requires an infusion of County General Funds to stay operative.

As of January 11, 2001 there were 11,898 valid concealed handgun licenses in Multnomah County. The County has the highest number of licenses in Oregon but also has the highest denial and revocation rate.

There are no medical limitations on receiving a license.

Recommendations:

1. The DFR Committee commends the Unit's efforts to explore the process for increasing fees so that the program can become self-supporting. The committee recommends that the efforts be continued as appropriate.
2. The replacement of the Clerical Supervisor position with an Office Assistant II classification is of concern due to the large renewal load expected in the fall of 2002. The committee suggests that this decision be carefully monitored and evaluated in light of possible short term cost savings contrasted with office procedure experience and staff morale.
3. Because there are no medical limitations in the original handgun statute, public safety concerns need to be addressed in the form of a medical amendment. The DFR Committee again suggests a change in the statute language that should read "denial of license if it is physically impossible to operate a handgun safely".
4. In order to correct the need to dip into the General Fund every four years due to the renewal cycle, the DFR Committee once again recommends that the County push for handgun renewals on a 2-year cycle with a higher fee.
5. The DFR is in support of the Expedited Access Program as a way to provide additional funding for the Unit.
6. Tuition for the County Safety Class should be set at a reasonable rate to ensure attendance.

**Marriage License Fees 3021
Conciliation Court Fees 4850**

The Conciliation Fund, which provides for the Multnomah County Court Family Services Program, receives funds from the marriage license and divorce filing fees to provide family counseling and recommendations to the court on child custody and support.

Findings:

This program is supervised by the presiding judge of the Family Law Court and is accounted for in the Department of Community Corrections. The staff are Multnomah County employees.

The Family Court Services Program provides three distinct services using these funds. They include Conciliation, Mediation, and Custody and/or Parenting Time Evaluations. These services are valued by the Family Law Bench, the Family Law Bar, and parents. These funds make possible efforts to allow resolution outside of the courtroom whenever possible and appropriate.

Recommendations:

1. Increase Marriage License and Divorce Filing Fees in order to provide the necessary support for these valuable services.
2. Continue parent education requirement and fees.
3. Increase publicity of Parent Education and related programs.

Forfeiture Fund 6150

These funds account for the revenue derived from the sale of goods seized under federal and state statutes that allow seizure of property that has been used for criminal purpose or was purchased with funds from criminal activity. Separate Reviews of the District Attorney's and Sheriff's Offices Forfeiture Funds were conducted.

General Findings:

According to Multnomah County Ordinance 633, half of the revenue is returned to the seizing agency, 35% goes to the District Attorney for prosecution costs, and 15% is distributed to the General Fund of the seizing jurisdiction.

Federal Law requires the revenue be used to enhance the seizing agency's budget, not for replacement. The state law, until recently, allowed expenditures for justice/law enforcement programs. The passage of Measure 3 in November 2000 made drastic changes in the allowed use of these funds. The effects in Multnomah County are discussed below.

District Attorney's Forfeitures and Video Lottery Fund 6150

The fund was established to enable the District Attorney to separate and track two sources of funds: forfeiture and video lottery receipts.

Findings:

Since the inception of the fund, video lottery proceeds for law enforcement were determined to be unconstitutional and the proceeds were returned to the State of Oregon. In the past three years, the Forfeiture Funds have paid for two sets of activities: the Forfeiture Unit and Drug Unit Support.

The Forfeiture Unit was responsible for processing seized and forfeited property related to the violation of state drug laws. The staff reviewed all cases referred from police agencies within Multnomah County and carried through the civil process required to obtain forfeiture.

The Drug Unit Support activities started in FY 99 and consisted of a Deputy District Attorney and a legal assistant assigned to the Drug Unit. These positions were funded using prior year forfeiture funds (carryover). In addition a computer support staff person was hired to create a case tracking system for the Forfeiture Unit.

In November of 2000 Ballot Measure 3 was passed by the voters of Oregon and changed the Oregon Constitution. Measure 3 made the use of civil forfeiture much more difficult. As a result, Multnomah County's District Attorney's Office closed down its forfeiture activity in December 2000. The Drug Unit Support activities will continue through 2002 and then will either be eliminated or transferred to the General Fund.

1. The DFR Committee congratulates the District Attorney's Office on its efforts and was sorry to discover that the passage of Measure 3 has made the continuation of these activities impossible. If an opportunity arises to support legislation to fund these activities, the committee encourages the County to do so.
2. If there is any activity on forfeiture regulations via the legislature or other means, the District Attorney's Office should notify the Central CBAC via the Multnomah County Citizen Involvement Office as soon as it happens.
3. The District Attorney's Office should continue to support the Drug Unit's case tracking system as long as feasible in order to obtain valuable assessment information.

Sheriff's Office Forfeitures 6150

Oregon's Measure 3 passed in November 2000 prevents any further seized assets from being used for law enforcement purposes. Any such revenues must be used for drug rehabilitation programs.

Findings:

Monies received over the past three years and monies remaining in this fund have and will be used primarily to fund the drug enforcement efforts of Multnomah County Sheriff's Special Investigation Unit. The fund has been used specifically for buy money, informant fees, equipment, vehicle purchase and maintenance, overtime, and ongoing training for the Special Investigations Unit and others associated with the drug enforcement effort.

Funds have also been allocated to drug and alcohol awareness programs, specifically the "Every 15 Minutes" program. This effort is aimed at high school aged students and is designed to make them aware of the dangers and hazards of use and abuse of alcohol and illegal drugs.

Recommendations:

1. The DFR Committee congratulates the Sheriff's Office on its efforts and was sorry to discover that the passage of Measure 3 has cut these activities so severely. If an opportunity arises to support legislation to restore funding of these types activities, the committee encourages the County to do so.
2. Publicize the negative impacts of the loss of these funds on drug enforcement as well as drug awareness and treatment programs.
3. If there is any activity on forfeiture regulations via the legislature or other means the Sheriff's Office should notify the Central CBAC via the Multnomah County Citizen Involvement Office as soon as it happens.
4. Continue the Sheriff's Office's support of drug and alcohol abuse awareness education in our community.
5. Continue to work with high schools on prevention programs

Liquor Control Fund 6102

The Liquor Control Fund is a small amount of money collected by the Court and transferred to the District Attorney's Office to support the enforcement of liquor control laws. The Multnomah County District Attorney has chosen to track this revenue within the Justice Services Special Operations Fund 180.

Findings:

The funds come from fees assessed to convicted drunk drivers. State Statute allows that every six months any law enforcement agency in the County may request revenue from the Liquor Control Fund to assist their own Liquor Control efforts. Any funds not used within the six-month window become part of the County's General Fund.

Multnomah County's District Attorney's Office has been using these funds to support the DUII/Traffic Unit. A "sniffer flashlight" was funded for one agency in FY 97.

Recommendations:

1. Continue to use these funds for the DUII/Traffic unit and the purchase of needed equipment such as the "sniffer flashlight".
2. Support education efforts on the dangers of the abuse of alcohol.

Emergency Communication Fund 151

This fund consists of telephone excise taxes collected by the State and distributed to the local jurisdictions. This revenue is based on the number of residents in the unincorporated areas of the County.

Findings:

The revenue is used, as required by state statute, to help pay for "911" calls, ambulance dispatch, and Sheriff patrol dispatch costs. The County contracts by "letter of understanding" with the City of Portland for this service.

With the population of the County growing in the unincorporated areas revenue is increasing. However, there is still a need for supplements from the General Fund.

Recommendations:

1. The DFR Committee was pleased with improvements in the service and recommends that the County continue to contract with the City of Portland.
2. There are fewer dead spots in the County with the addition of new antennas. These dead spots should be reported and eliminated.

Justice Bond Project Fund 230

This fund accounts for projects to expand Inverness Jail, construct new jail facilities, upgrade other jail facilities, and pay for major data processing linkages in the Corrections system. Proceeds are derived from the sale of General Obligation Bonds approved by voters May 21, 1996. The fund was created in the 1996-97 Adopted Budget.

Findings:

A bond for these projects was issued for 7.5 million in 1996. The bond has been used for the purchase of the property for the Children's Receiving Center, upgrading current jail facilities including new drug and alcohol bed and data processing equipment, and the addition of a pod at the Juvenile Justice Complex. The ground breaking for the Wapato Jail will be this year. The selection of this new jail site was a slow process. As of February there was \$52,839,108 available in the fund.

Recommendations:

1. Continue to invest the bond monies until they are needed.
2. Continue to lease the property until construction and remodeling at the purchased Child Receiving Center site occurs.

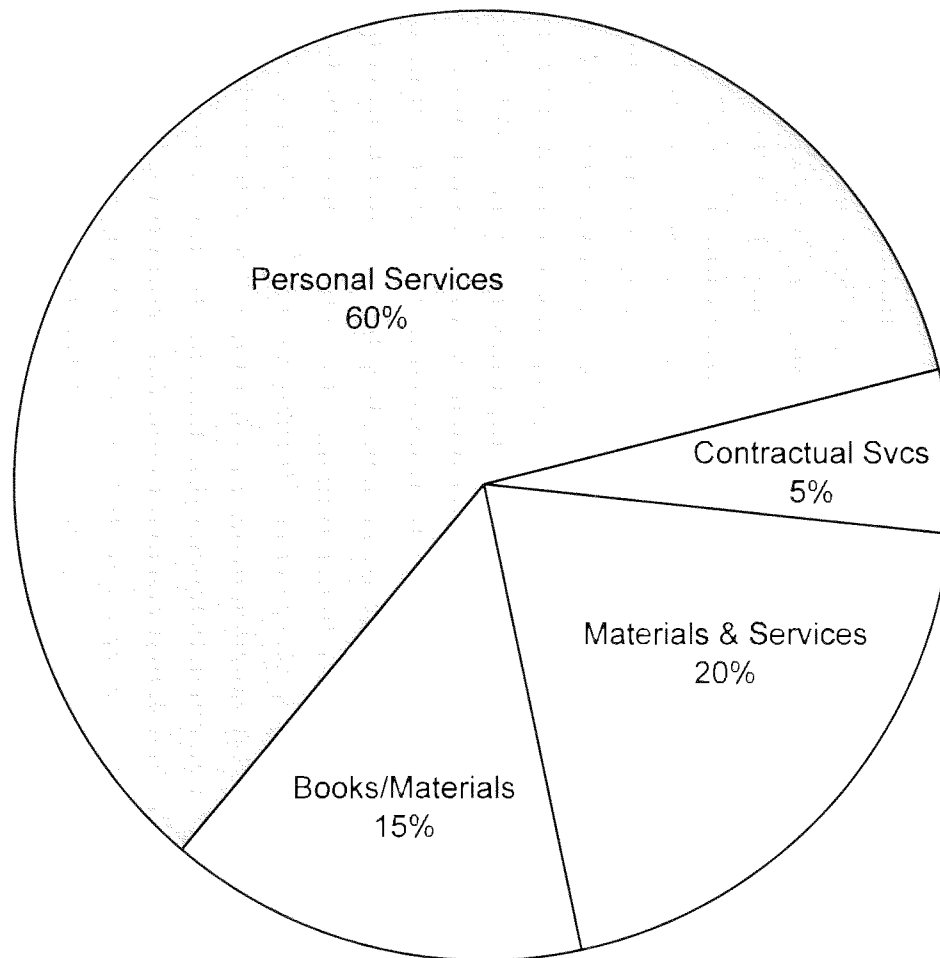


AGENDA
LIBRARY BUDGET HEARING
May 8, 2001, 9:30 am

- I. Introduction
- II. CBAC Report – Terry McCall, Library Board Chair
- III. Keeping our Commitment – Year 4 of the Library Levy
 - a. Expenditures & Revenues
 - b. FTE Changes
 - c. Delivering Library Services
 - ◆ Overview – how are we doing?
 - ◆ Highlights
 - Book Budget
 - Teen Initiative
 - ◆ Implementing the Plan
 - LIBROS
 - Services to Children
 - ◆ Buildings
- IV. Issues & Challenges
 - a. The Fifth Year and Beyond
 - b. Meeting Students Needs
 - c. East County Agenda
- V. Questions

Library Expenditures FY 2001-2002

\$44.8 Million

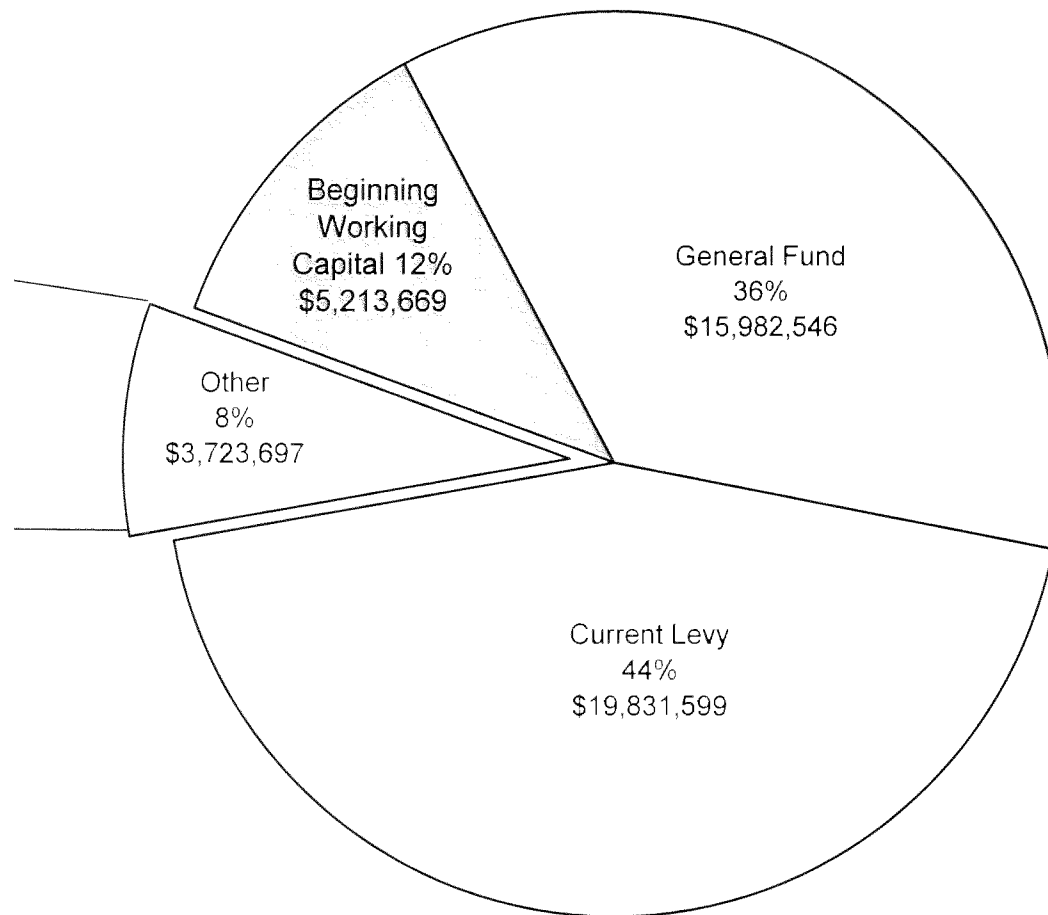


- Personal Services \$26,830,728
- Contractual Services \$2,484,537
- Materials & Services (Includes Building Maintenance, Supplies, Indirect, Rentals) \$8,963,992
- Books/Materials \$6,472,254

Library Revenues FY 2001-2002

\$44.8 Million

10% Sales/Internal Reimb.
42% Foundation and Other Grants
33% Fines
7% Fees
8% Interest

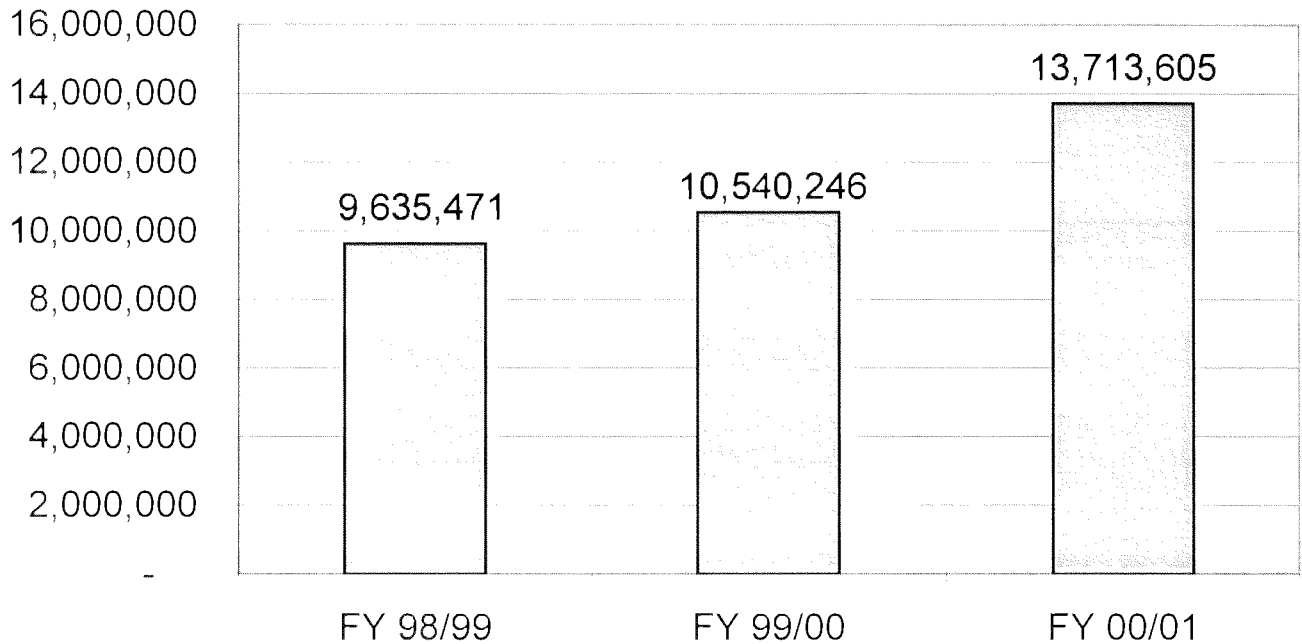


Library Department
FTE Changes
Approved Budget for FY 2001-2002

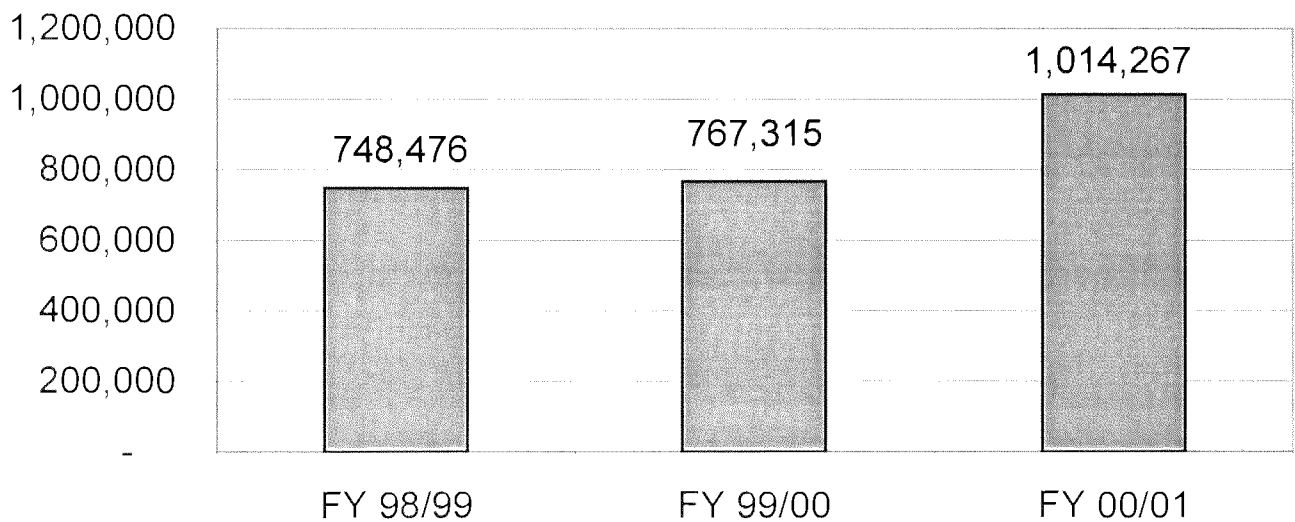
Division	00-01	01-02	FTE Difference	Remarks
Director's Office	14.90	14.50	(0.40)	
Central Library	174.75	172.25	(2.50)	
Community Services	188.02	210.00	21.98	New branches (Fairview Columbia, NW, N. Interstate): 16 Reopened branches (Hollywood, Sellwood): 6.75
Support Services	79.60	89.75	10.15	Increased materials handling & movement (2.0) Increased IT support for new/larger branches (3.0) Increased HR & fiscal support (1.5) Increased Learning Systems/Ref & Info Svcs. (2.25)
Outreach Services	23.25	29.25	6.00	Expansion of LIBROS Initiative (4.0) Expansion of Books 2 U (1.0) Jail Services Position (1.0) Prev.held by long-term vol.
FTE Total	480.52	515.75	35.23	

Multnomah County Library Service Measurements

Circulation



Reference Questions



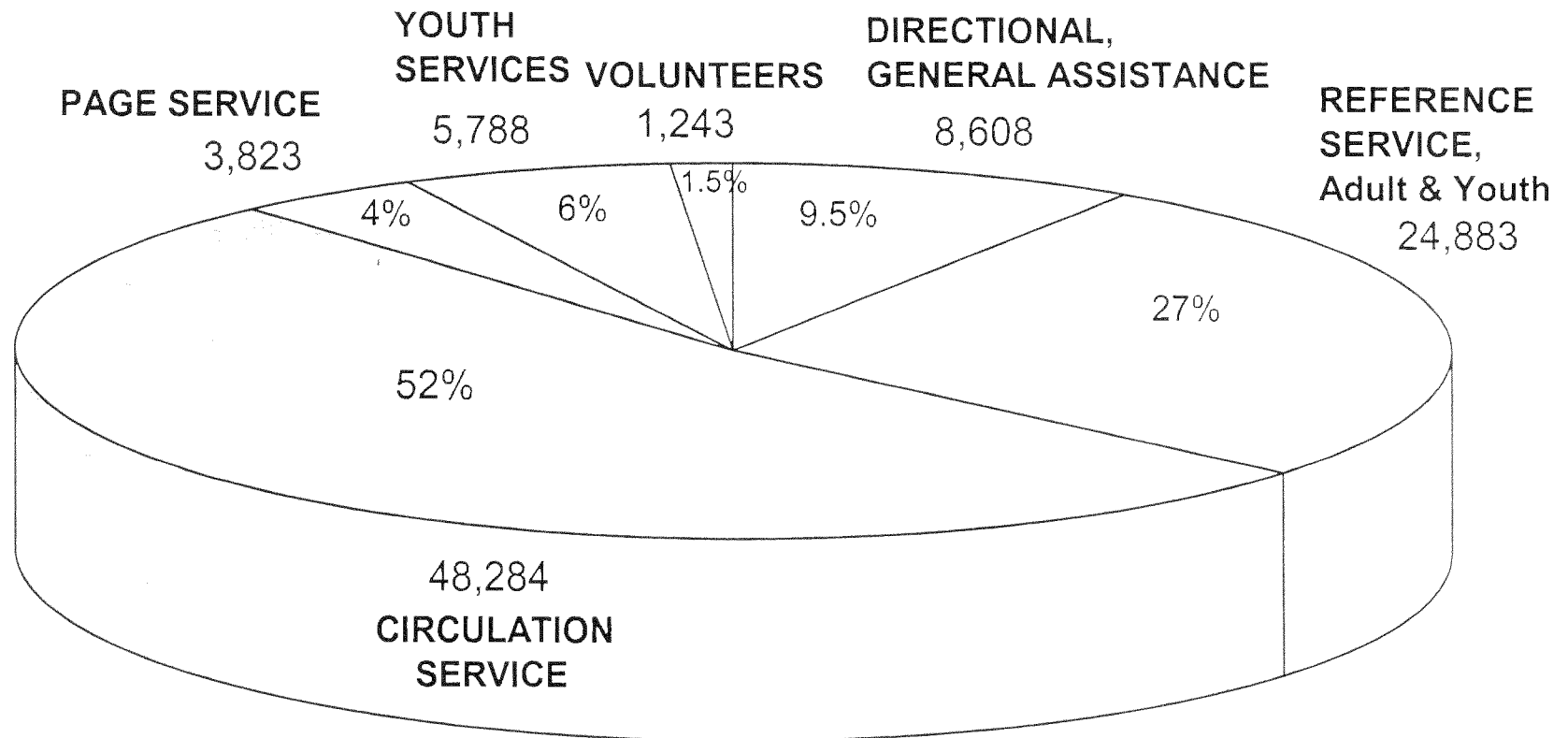
Central Door Count for FY 00/01: 1,291,692 (average 3,558/day)

MCL CUSTOMER SERVICE CONTACTS

Feb. 25 - March 3, 2001

(In-person or over the phone)

GRAND TOTAL: 92,629



Based on this "typical" week, yearly total is almost 5 million!

MCL CUSTOMER SERVICE CONTACTS

In a typical week almost 93,000 Multnomah County Library customers get personal assistance from a library staff member. This occurs either in-person or over the phone; at branches, at Central Library, at the Library Administration Building, and in community schools, childcare centers, the Juvenile Detention Center, senior centers, and other locations.

CIRCULATION SERVICE: 48,284 contacts

Staff who issue library cards, check out books, retrieve books on hold, and resolve issues about fines and overdue books, at Central and all branches

Renewal Line staff, who renew books over the phone

REFERENCE SERVICE: 24,883 contacts

Librarians, Youth Librarians, and Library Assistants at reference desks at Central and all branches; providing reference service to customers of all ages

Library Assistants in RefLine, our telephone reference service at Central
Librarians, Youth Librarians, and Library Assistants who conduct training sessions for the public

DIRECTIONAL, GENERAL ASSISTANCE: 8,608 contacts

Staff at Central, all branches, and Library Administration Building

Staff who give library tours

Library Outreach staff

InterLibrary Loan staff

Central Events Coordinator

Central Welcome Desk staff

Automation Services Help Desk

Material Selectors

Public Relations staff

YOUTH SERVICES: 5,788 contacts

Youth Librarians who do story times, host school visits, and present other youth programs at Central and all branches

School Corps Librarians

Books 2 U outreach staff (doing booktalks & promoting reading in schools)

Early Childhood outreach staff

Juvenile Justice Outreach Librarian

LIBROS Spanish Outreach Specialist

Talk It Up! Librarian (promoting book discussion groups for kids)

PAGE SERVICE: 3,823 contacts

Page staff who retrieve and shelve books, at Central and all branches

VOLUNTEER SERVICES: 1,243 contacts

CyberSeniors volunteers

Volunteers who staff the Title Wave Used Bookstore

TechnoHosts and Homework Helpers

Volunteer Services staff

Master Tracking Sheet

Budget Worksession Follow-Up Questions

No.	Date	Commissioner	Respondent/ Dept	Completed	Question
1	5/1/01	Naito, Farver	Budget Office	Noted	Flag decision points when potential for urban renewal district property to come back on the tax rolls.
2	5/1/01	Cruz	MCSO	5/18/01	Issue paper on Pay to Stay; provide rough draft at MCSO budget session
3	5/1/01	Roberts	DCJ	5/22/01	Describe the issues that keep kids from going to school.
4	5/1/01	Naito	CFS		Historically, how have we funded our other community centers (i.e. Clara Vista, Brentwood Darlington). Who are our other partners? Provide details on the service components, funding capital contribution, other source (city) contributions?
5	5/1/01	Cruz	Chair/Budget		Provide FFP funding and develop language to create placeholder for Clara Vista and Rockwood concurrently if there is additional FFP funding.
6	5/1/01	Andersen	Budget Office	5/04/01	Create MH Council Follow Up session
7	5/1/01	Naito	DA/DCJ		What type of funding can we expect from LLEBG as compared to a national perspective? Additionally, what has the city spent LLEBG funding for in the past (police overtime, equipment, etc...)?
7	5/1/01		DCJ/MCSO/ Evaluation	5/18/01	Pretrial Release issue paper as a result from Chicago visits
9	5/1/01	Andersen	Finance		Describe funding proposal for Mainframe migration
10	5/1/01	Andersen	Finance		Status of bond projects and remaining funding available. Risk ranking
11	5/1/01	Naito	DSCD/Finance	5/29/01	Facilities Finance Committee report (Naito resolution)
12	5/1/01	Cruz	Budget Office	5/16/01	List of items in budget funded by FFP
13	5/1/01	Cruz	MCSO	5/11/01	Report on MCSO implementation of Fleet Audit; in compliance why or why not
1	5/8/01	Naito	Budget	Noted	Lay out budgets by funding source (see state for example)
2	5/8/01	Naito/Farver	Budget	Noted	Levy Planning for Library, Public Safety. Hard data for potential operating levies this fall. Budget Office to prepare information this summer.
3	5/8/01	Cruz	DSCD/ MCSO	5/18/01	Work Crew Proposal Concerns: Is it legal to use MCRC residents for custodial work? Will we have enough time to address significant policy questions during budget process? What will it look like (implementation and operationally).
4	5/8/01	Naito	Depts/ F&PM	Noted	Policy threshold re: bringing leases to bcc under \$50,000. Forward policy matter to BCC even though small amounts as an FYI.
5	5/8/01	Roberts	Library	5/14/01	How does the Library interact with SUN Schools? Library to provide brochure
6	5/8/01	Anderson	Library	5/14/01	Delineate OTO payments in FY 2002.
7	5/8/01	Naito	Library	Noted	Summer project to review county services in schools (prior to Library Levy review)
8	5/8/01	Cruz	DSCD	5/16/01	Follow-up on number of properties available to Tax Title and strategies to fund

					in future. Shortfall?
9	5/8/01	Cruz	DSCD	5/16/01	Additional discussion on our role as developed for mixed used buildings.
10	5/8/01	Anderson	DSCD	Noted	Provide information in advance of capital budget presentation.
11	5/9/01	Naito	DSCD	5/16/01	Amendment: Rail line between Portland and Lake Oswego - \$30,000/year have we been contributing that amount? IGA. What amount have we given? History and status. Possible amendment item.
12	5/9/01	Anderson	CCFC		Amendment: Native American Youth
13	5/9/01	Naito	CBAC	5/15/01	Amendment: CIC restoration \$8,447
14	5/9/01	Cruz	ONI/PAO	5/14/01	Provide a sense of the siting calls, in terms of operations of office.
15	5/9/01	Cruz	Cooperative Extension		Budget Note: Review funding for non-d regarding (extension)agencies and county funding
16	5/15/01	Cruz	ADS/Health/ Budget Office		Amendment: How to fund the MDT Nurses? Total funding; Medicaid match and non-Medicaid match? And split between ADS and Health? Present options.
17	5/15/01	Cruz	ADS/PAO		Budget Note: Keep OPI at the top of our legislative agenda. Help state approach federal government (federal to advocate for a change in Medicaid to recognize OPI for eligibility)
18	5/15/01	Farver	DRM		Budget Note: DRM's to develop county-wide policy paper for bcc consideration over the summer re: state funding for formula issues. (reference ADS equity issue). Consider DHR reorganization as part of the partnership context.
19	5/15/01	Farver	CFS/Mental Health		Clarify differences/costs between today's presentation and prior resolution (Lane County model). Commissioner concerns: Naito: Case management piece; more detail re: contracting out. Variation on theme how gatekeeping is done and how we would contract out. Why is this the best model with cost comparison of a couple of models. Want to see here is the best and why. Cruz- concerns center around where plan doesn't follow resolution case management; cost analysis consistent with resolution (case management function); wants collaborative process utilizing our expertise and the provider networks. Anderson-walk through the plan. Set up meeting at later time to review. Farver-looking for budget specifics and tradeoffs to make it real. Timelines.
20	5/15/01	Farver	MH Dept/ Jim Gaynor		Budget Note- come back with package of budget amendments; come back in a series of meetings over the course of the year. MH Redesign group to return with a group of amendments about the specifics of the system re-design.
21	5/16/01	Cruz	Health		Budget Note— Time frame for reviewing revenues coming into Health Department/Primary care clinics. Include potential cuts, if revenues do not meet projections. Quarterly Status Report. Have a broader issue to capture FFP, fees, etc

[illegible]