



MULTNOMAH COUNTY
AGENDA PLACEMENT REQUEST – short form

Board Clerk Use Only

Meeting Date: 05-25-2010
Agenda Item #: WS-1 thru
Est. Start Time: WS-7
Date Submitted: 9:00 am – 4:30

Agenda Title: **FY 2011 Budget Worksession on Policy and Operational Challenges and Issues – County Human Services, Health, Library, Community Justice, Sheriff, District Attorney, Community Services, Non-Departmental, County Management, Information Technology and the Facilities Capital Plan.**

Note: If Ordinance, Resolution, Order or Proclamation, provide exact title. For all other submissions, provide a clearly written title.

Requested Meeting Date:	<u>May 25, 26 and 27 if necessary</u>	Amount of Time Needed:	<u>11.5 hrs. (9:00-4:30 p.m.) And (9:00-3:00 p.m.)</u>
Department:	<u>County Management</u>	Division:	<u>Budget Office</u>
Contact(s):	<u>Karyne Kieta, Budget Director</u>		
Phone:	<u>503-988-3312</u>	Ext.	<u>22457</u>
		I/O Address:	<u>503/5/531</u>
Presenter(s):	<u>Karyne Kieta, Department Heads and invited staff</u>		

General Information

1. What action are you requesting from the Board?

After the Chair's Proposed Budget is approved for submission to the Tax Supervising & Conservation Commission (TSCC), the Board may begin deliberations on it. These worksessions are the second opportunity for the Board to hear from the departments. The Board will have the opportunity to ask clarifying questions and to deliberate on the approved budgets. There are no decisions to be made at this point in the process. Board members may propose budget notes or amendments at anytime in the process during a public worksession.

2. Please provide sufficient background information for the Board and the public to understand this issue. Please note which Program Offer this action affects and how it impacts the results.

Last week, the Board had the first wave of worksessions where departments presented budget overviews regarding what changed from the FY 2010 Adopted Budget to the FY 2011 Proposed Budget. We are now moving into the second wave, where the Board will hear about the policy and operational challenges and issues that the department will be facing in the upcoming fiscal year. The

Board will also hear from each department's CBAC on its recommendations. The second wave of worksessions is scheduled for a full day on May 25th, most of the day on May 26th, and a follow-up worksession on May 27th, if needed. May 25th and 26th worksessions are broken down into a morning and afternoon sessions. The first morning session will begin with the Department of County Human Services, the Health Department and the Library. The afternoon session will begin with the Community Justice, Sheriff, District Attorney and then Community Services. May 26th will begin the morning with Non-Departmental, and County Management. Information Technology will kick off the afternoon and then we will hear about the Capital Plan from Facilities. A follow-up session is scheduled for May 27th in the afternoon if needed. Below is a detailed schedule for the second wave.

May-10		
	25	BOARD WORKSESSION: Policy & Operational Challenges & Issues
9:00		DCHS
10:00		Health
11:00		Library
Noon		LUNCH Break
1:00		DCJ
2:00		MCSO
3:00		DA
3:45		CS
4:30		Adjourn
6:00-8:00		PUBLIC HEARING - IRCO, 10301 NE Glisan
9:00	26	General Fund Forecast Update - 3rd Quarter
		BOARD WORKSESSION (cont): Policy & Operational Challenges & Issues
9:45		Non-Departmental
10:30		DCM
11:30		LUNCH Break
1:00		IT
2:00		Capital
3:00		Adjourn
1:00-3:00	27	Follow-Up Worksession, If needed
6:00-8:00		PUBLIC HEARING - East County - 600 NE 8th Street, Gresham
	31	HOLIDAY - MEMORIAL DAY

During the FY 2010 budget debrief (July, August 2009), members of the Board and their staffs expressed their desire for a different format for the FY 2011 budget worksessions. District 1 staff, the Chair's Office, and the Budget Office proposed several alternative formats that Board staff reviewed with their Commissioners. Consensus was reached to focus and streamline the worksession formats. This first "wave" of worksessions focused on what changed from the FY 2010 Adopted Budget to the FY 2011 Proposed Budget. The second wave will focus on Policy and Operational Challenges and Issues for FY 2011. A general agenda was developed for all departments to follow. This high-level agenda will allow them the greatest flexibility in their presentations respecting the uniqueness of each department. The agenda for the second wave is as follows:

FY 2011 Department Agenda Format

WAVE 2 – Policy and Operational Challenges & Issues

1. Agenda Overview/Introductions
2. CBAC
3. Challenges & Issues
 - a. Policy
 - b. Organizational & Operational
 - c. Other

4. Follow-Up

The third wave is the evening public hearings where testimony is taken and overlaps with the second wave. The TSCC hearing is scheduled for June 9th and the budget is scheduled to be adopted on June 10th.

3. Explain the fiscal impact (current year and ongoing).

N/A—Board work session only.

4. Explain any legal and/or policy issues involved.

N/A—Board work session only.

5. Explain any citizen and/or other government participation that has or will take place.

The Chair's Proposed Budget included significant public participation. Several community forums have been held to date, and additional public hearings and community forums have been scheduled at various times during the upcoming weeks.

Required Signatures

Elected Official or
Department/
Agency Director:

Mindy Harris

Date: 5/6/2010

FY 2011 Budget Worksession Month

Last Updated: May 19, 2010

Month	Date	Task
May-10		
	25	BOARD WORKSESSION: Policy & Operational Challenges & Issues
9:00		DCHS
10:00		DCM
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3:00		Adjourn
1:00-3:00	27	Non-Departmental
6:00-8:00		PUBLIC HEARING - East County - 600 NE 8th Street, Gresham
	31	HOLIDAY - MEMORIAL DAY
June-10		
9:00-12:00	1	Board Worksession: Follow-Up and Amendment Review
6:00-8:00	2	PUBLIC HEARING - Multnomah Building
	3	Special Districts - Adopt Budget
1:00-3:00		Follow-Up Board Worksession - <i>(if needed)</i>
9:00-12:00	8	Board Worksession: Follow-Up and Amendment Review
3:00 - 5:00	9	TSCC Hearing
	10	Budget Adoption

MULTNOMAH COUNTY OREGON

May 18th and 19th, 2010



FY 2011 Budget Worksession

Issues/Discussions/Findings
Department of County Human Services
Follow-Up - Department to provide a schematic of the "Safety Net". Presented at the next worksession. See slide 6 of attached May 25th presentation materials.
Follow-Up - Department to address what are "core services". Presented at the next worksession. See slide 6 of attached May 25th presentation materials.
Provide on-going information on how PO 25065 Mental Health Peer Clubhouse will link to workforce development efforts already underway (i.e. City of Portland). Also, provide information about State Funding for employment services – how much? Department Response: DCHS will be developing a request for proposal for the Peer run Clubhouse model of supported employment and social connection for individuals with sever and persistent mental illness. Once a provider is selected, DCHS will connect that provider with the workforce development system to ensure a connection with existing workforce efforts, including locating appropriate employment opportunities. Currently DCHS Addictions and Mental health Services Division provides approximately \$240,000 in state funding to Lifeworks and Central City Concern for supported employment for individuals who do not have insurance. Supported employment and peer support are two interventions that are strongly associated with recovery for persons with serious and persistent mental illness.
BOARD BRIEFING – PO 25124 East County Homeless Outreach during the coming year report back to on the progress Will schedule a board briefing for January 2011.
BUDGET NOTE (Willer) – <i>(specific language tbd)</i> SUN contracts all require innovation around fee collection. DCHS will provide a report to the Board regarding the status of fees and collection. The report will detail out the information by school including the demographics for each individual school. Report will be presented to the Board within 2 months of FY 2011 budget adoption. Will work with Budget Office to develop budget note for FY 2011 budget.
Health Department
Follow-Up – provide an overlay of clients served onto the FTE graphic.
Continued understanding of how national healthcare reform will impact the Health Department and the County's health costs.
Follow-Up – provide a client grid by service FY 2010 to FY 2011. Presented at the next worksession
Follow-Up – provide detailed budget information (similar to DCHS budget presentation).
County Management
Follow-Up – information on the progress of the Management Class Comp. Presented at the next worksession
Follow-Up – information on the contracts redesign and business process re-engineering implementation. Presented at the next worksession

Community Services
BOARD BRIEFING – October 2010, Animal Services Briefing on programmatic changes. Department will schedule.
Information Technology
Follow-up – cost benefit analysis of the new space configuration for the Multnomah Building 4 th floor. RESPONSE: The space efficiency calculated for the reconfiguration of the 4th floor of the Multnomah Building using the Hermann Miller 120° System is as follows: <ol style="list-style-type: none">1) Current work stations on the 4th Floor—1452) Reconfigured work stations on the 4th Floor—196 The reconfiguration will result in 51 additional work stations, an efficiency of 35%.
Community Justice
Follow-up – discuss the program offers funded with OTO funds. Presented at the next worksession
Sheriff's Office
Follow-up – discuss the impact of the data analyst in Business Services. Presented at the next worksession
Countywide
Follow-up – Budget Office will provide year over year comparison, by department, fund and FTE. Information sent to BCC on May 19, 2010

MULTNOMAH COUNTY OREGON

May 18th and 19th, 2010



FY 2011 Budget Worksession

Issues/Discussions/Findings

Department of County Human Services

Follow- Up - Department to provide a schematic of the "Safety Net" at the next worksession.

Follow- Up - Department to address what their "core services" are at the next worksession.

Provide on-going information on how PO 25065 Mental Health Peer Clubhouse will link to workforce development efforts already underway (i.e. City of Portland). Also, provide information about State Funding for employment services – how much?

BOARD BRIEFING – PO 25124 East County Homeless Outreach during the coming year report back to on the progress

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Health Department

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County Management

Follow-Up – information on the progress of the Management Class Comp study.

Follow-Up – information on the contracts redesign and business process re-engineering implementation.

Community Services

BOARD BRIEFING – October 2010, Animal Services Briefing on programmatic changes.

Information Technology

Follow-up – cost benefit analysis of the new space configuration for the Multnomah Building 4th floor.

Community Justice

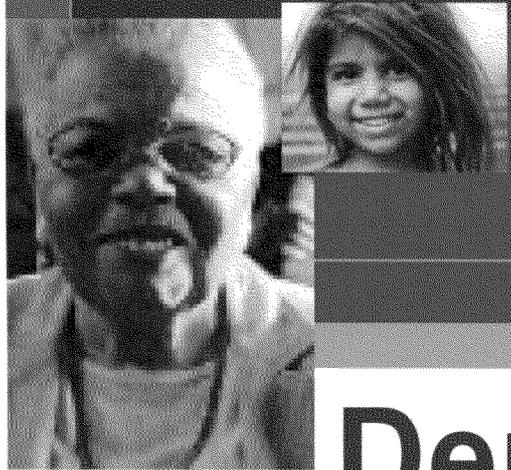
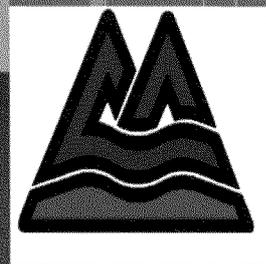
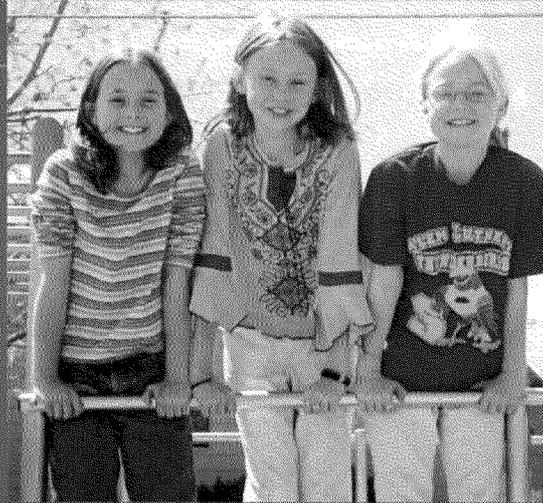
Follow-up – at the next worksession discuss the program offers funded with OTO funds.

Sheriff's Office

Follow-up – at the next worksession discuss the impact of the data analyst in Business Services.

Countywide

Follow-up – Budget Office will provide year over year comparison, by department, fund and FTE.



May 25, 2010

Department of County Human Services



Citizen Budget Advisory Committee

❖ Steve Weiss, DCHS CBAC Chair



2010 Briefings

❖ The Communities of Color briefing

- In the measures of income, poverty, occupation and education, communities of color have between 15% and 20% worse outcomes than whites.
- It is more difficult to get ahead here in Multnomah County than it is more generally across the USA. This inequity does not hold true for White people. On average, income for whites is enhanced by living in Multnomah County.

❖ Changing demographics

- Poverty is shifting from North/Northeast Portland eastward to Mid and East County.
- A large proportion of populations of color have moved to Mid and East County (both from other parts of the county and from outside the county)
- County-funded service locations have not kept pace with the movement of populations and the need for services.
- Identified need for County to engage in economic development investments focused on building human capital



MULTNOMAH
COUNTY

- ❖ The Crisis Assessment and Treatment Center- Update
 - City, County, State and Central City Concern funding for the capital/build-out is committed
 - Agreement reached between City, County and State regarding ongoing funding
 - RFP being developed for selecting operating provider
 - Building starts this summer, opens for service next spring



MULTNOMAH
COUNTY

❖ Workload Gap

- Effects the whole state
- 2006 study of current workload indicated an additional 218 F.T.E. are needed across the state
- Multnomah County earns approximately 25% statewide case managers- about 55 F.T.E.
- Funding associated with these new F.T.E's would be \$4.7 million the first year

❖ Equity

- State pays County 90% of what they pay themselves
- We've been arguing to get 95%



**MULTNOMAH
COUNTY**

System of Care*

Prevention, Early Intervention & Access to Services

- Gang services
- Alcohol and drug prevention- Strengthening Families
- SUN Service System
- Weatherization services
- Energy assistance
- EASA
- Senior Helpline
- Network of Care Website

Eligibility & Access to Medicaid Services

Community Supports

- Case management
- Long term care- seniors and developmental disabilities
- Legal advocacy, rental assistance for Domestic Violence
- Supports for homeless families
- Rental assistance & anti-poverty services

Treatment

- Continuum of care for youth with mental illness
- Continuum of care for adults with mental illness
- Alcohol and drug screening, referral and treatment for youth and adults
- Gambling treatment

Safety Net/ Crisis Services

- Shelter and emergency housing
- Protective services
- 24/7 mental health call center, walk-in clinic, mobile response
- Sub-acute services for adults and children
- Sobering and detoxification
- Developmental disabilities crisis residential
- Crisis shelter, housing, counseling

* These are examples of services in each level of the system

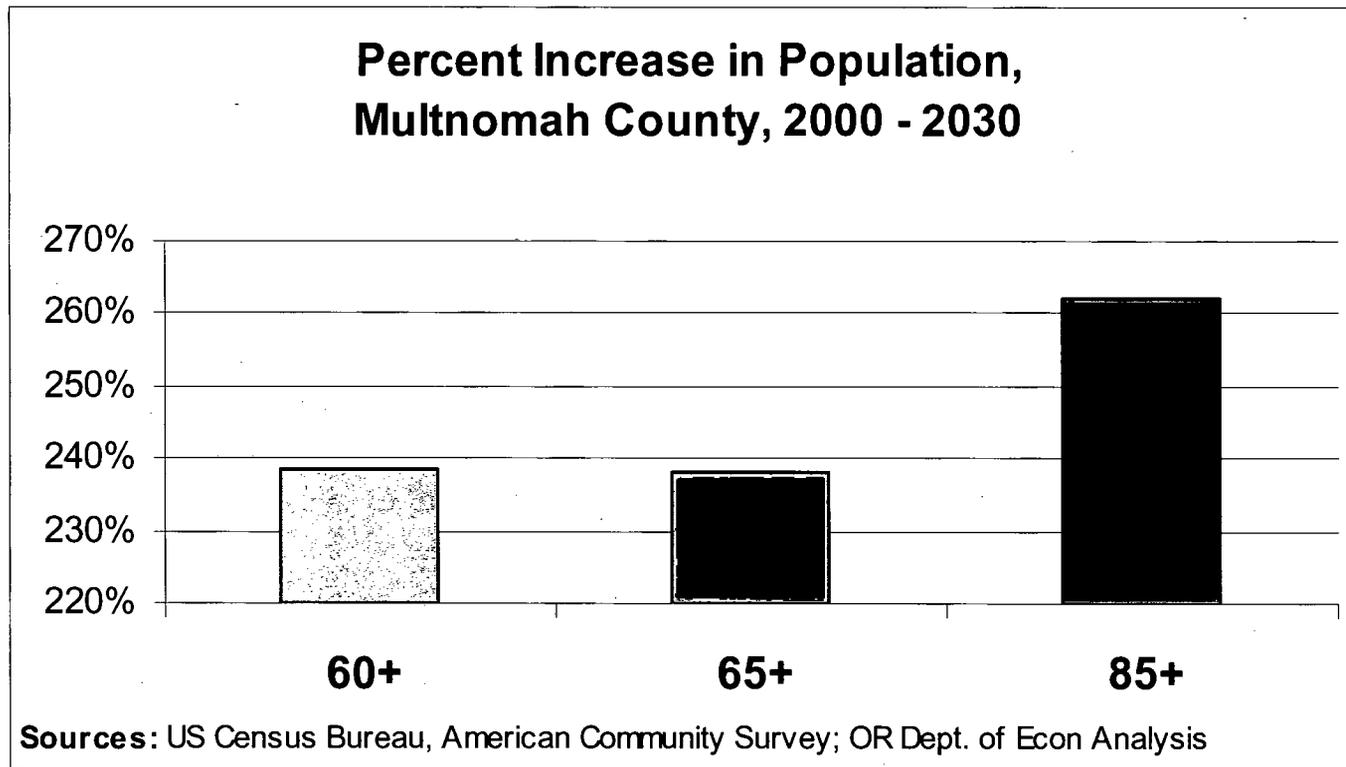


MULTNOMAH
COUNTY

❖ Preparing to reach the aging population
earlier



ADS: Bending the Cost Curve



The 85+ population (the “Old Old”) is the fastest growing demographic segment in Multnomah County and the nation.

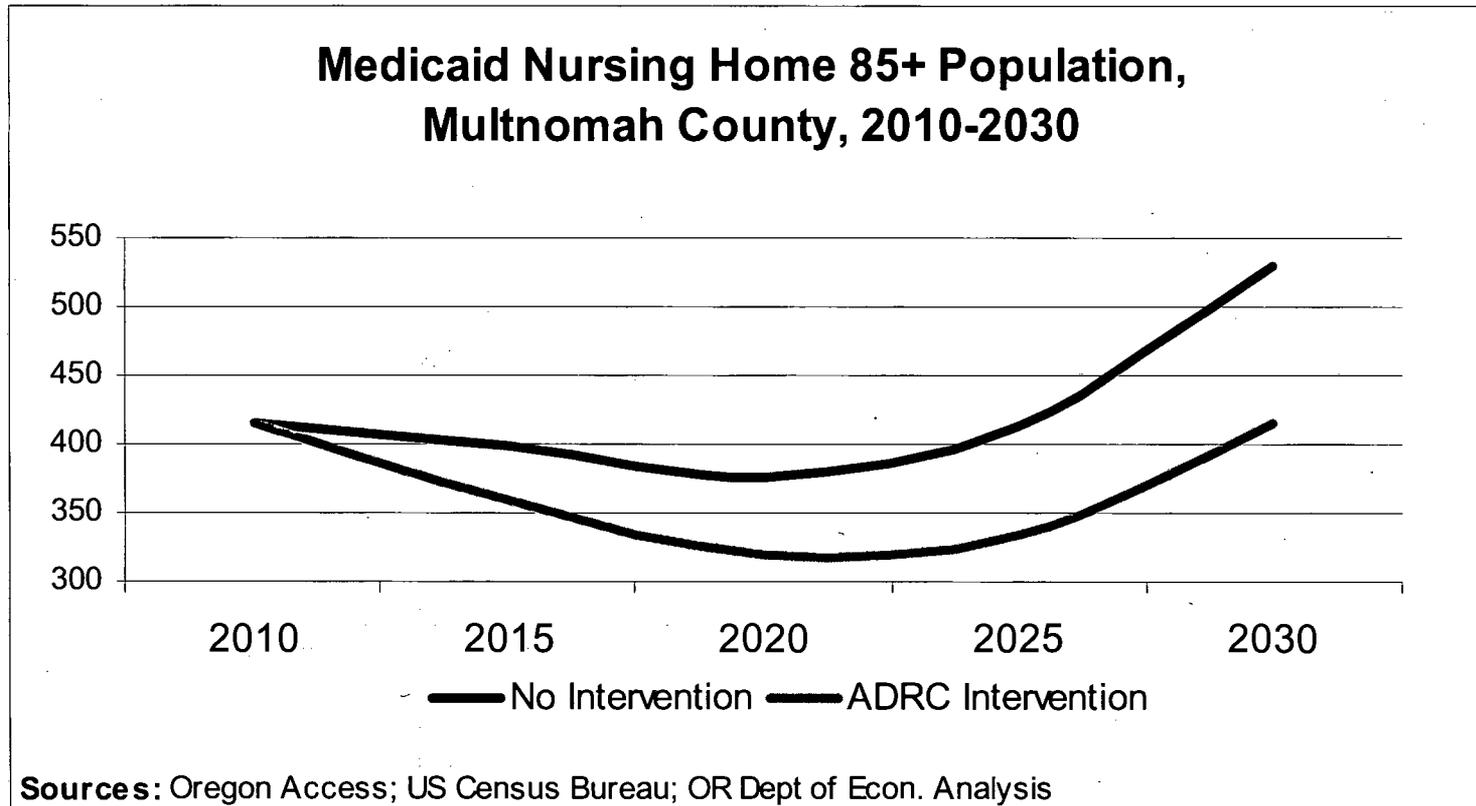


Aging and Disability Resource Centers

- ❖ ADRCs will control costs
 - Associated with the growing aging demographic through early intervention and access to information and assistance for seniors and people with disabilities of all incomes
- ❖ The Lewin Group study
 - Shows significant savings to Medicaid and Medicare with ADRCs through health promotion, disease prevention and nursing facility diversion
- ❖ ADRCs are a best practice
 - By reaching seniors and people with disabilities early and offering individualized information and assistance to manage their life changes and adapt to chronic conditions and disability, they can remain independent, safe and out of more expensive care longer or indefinitely
- ❖ Time is of the essence
 - Although Oregon is lagging, DCHS/ADS is starting the transformation now



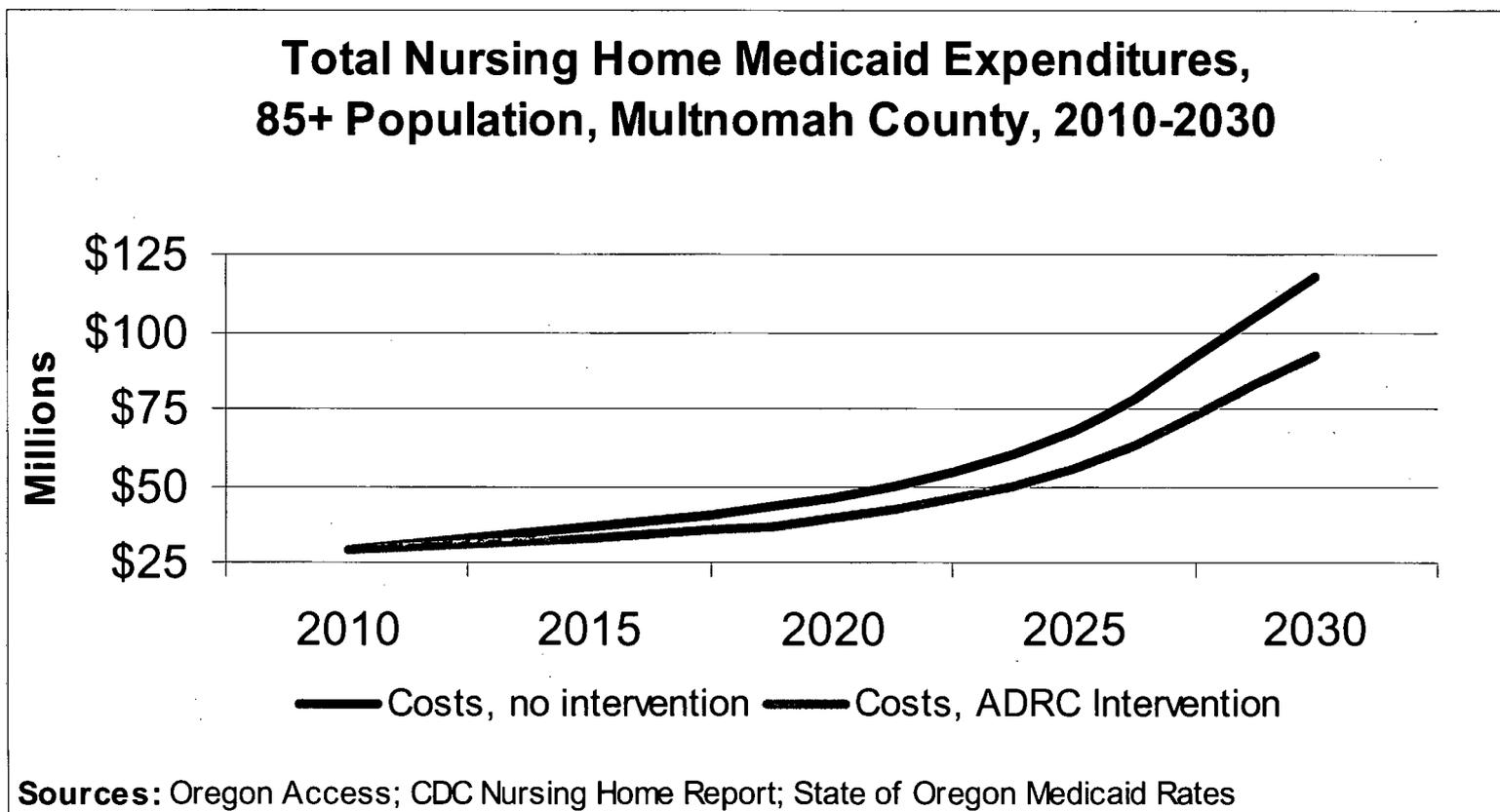
ADS: Bending the Cost Curve



Projecting a *very conservative* 10% transition and diversion among the 85+ population.



ADS: Bending the Cost Curve



If we begin now, the savings over this decade will accumulate to over \$10 million.



MULTNOMAH
COUNTY

❖ Recalibrating the 10 Year Plan to End Homelessness



MULTNOMAH
COUNTY

- ❖ Led by City and County leadership, with Portland Housing Bureau and community stakeholders
- ❖ Mid-cycle assessment of how to act strategically and convincingly about homelessness
- ❖ Intend to apply learning of last 5 years to the next 5 years- starting with an assessment of current general fund investment by City of Portland and Multnomah County
- ❖ The main focus of the County will be on homeless families with goal of initiating a major systems redesign process beginning late FY 2012
 - Process will use evaluation data from the 30 Families in 30 Days initiative, The Bridges to Housing collaboration, the Short-Term Rent Assistance system, the HUD “Cost of First Time Homelessness” study

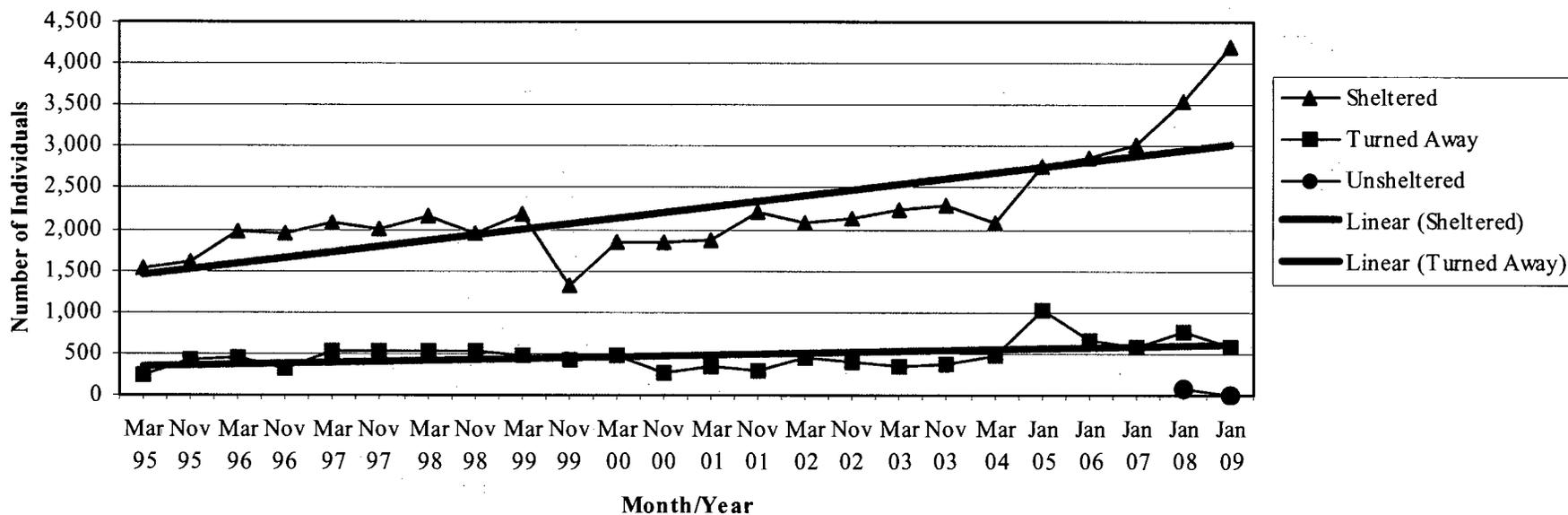


One Night Shelter Count

Individuals Sheltered or Turned Away

14-Year Trend Analysis

March 1995 - January 2009



We are sheltering more individuals, but the number of people going unsheltered is increasing as well.



MULTNOMAH
COUNTY

❖ Every School a SUN School



Policy Issues

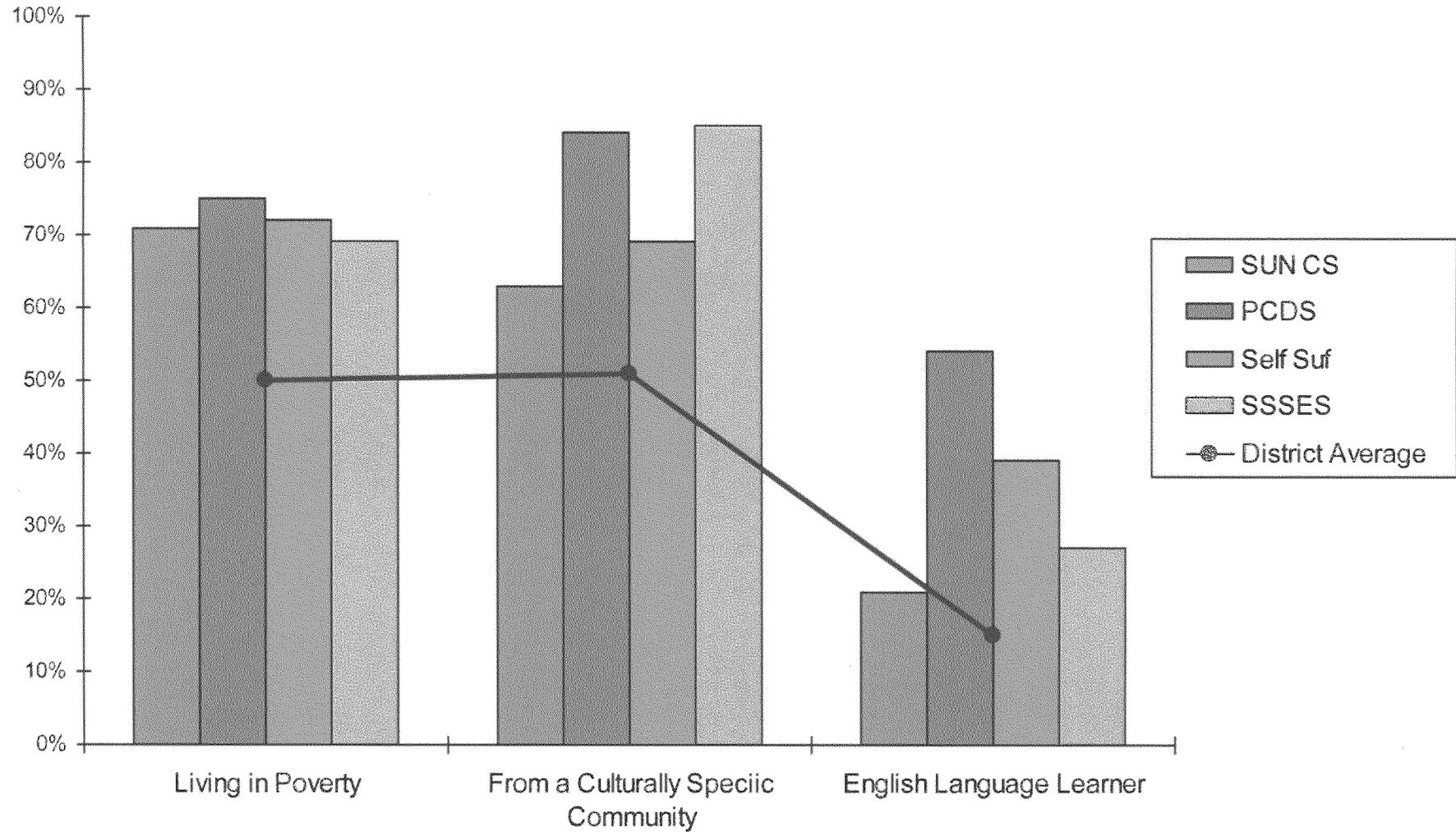
- ❖ Every School a SUN School
 - Defining a common vision
 - Developing phased in models
 - Engaging in discussions about High School redesign with Portland Public Schools

- ❖ Working to reduce the Drop-out Rate
 - SUNCS is a key strategy adopted by the Education Cabinet
 - High school model refinement and expansion

- ❖ SUN is a vital prevention strategy
 - Long term anti-poverty initiative
 - Serving majority of children who are poor, from culturally specific communities and/or English language learners



Populations served by SUN Service System





Department of County Human Services

MULTNOMAH COUNTY OREGON

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**Citizen
Budget
Advisory
Committee**

Members:

Patricia Backlar

William Barnes

Lenore Bijan

Mark Lewinsohn

Shalonda Menefee

John Richmond

David Thompson

Steve Weiss

March 15, 2010

Dear Interim Chair McLellan,

This letter represents the Department of County Human Services Citizen Budget Advisory Committee's draft recommendations regarding the pending FY2010-2011 budget.

This year, the county faces a \$5.4 million operating deficit and former Chair Wheeler has asked county leaders to reduce their FY2011 expenditures by 4%. The DCHS has made its FY2011 program offers available to our CBAC members and the remainder of this letter will be devoted to expressing our concerns regarding several of these offers.

In regard to program offers with partial reductions due to county general fund restraints, we are making the following recommendations:

- We recommend that the \$462,000 reduction to Multnomah Project Independence in Program Offer #25020 (Access & Early Intervention Services) be offset by funding out of target program offers #25020B for \$247,000 and #25020C for \$216,000. Funding both out of target offers would restore full funding for Multnomah Project Independence with case management and other support services provided by contracted agencies. These services are crucial to the lives of more than 200 people with disabilities in the county.
- We recommend that the \$600,000 reduction to the Multnomah Treatment Fund in PO #25063 be offset by funding out of target PO #25063B for \$600,000. If necessary, we could accept the partial funding of \$200,000 for this important program that restores coverage for mental health medications and other treatment for several hundred people without health insurance.
- We recommend that the \$938,000 reduction to Youth Gang Prevention in PO #25123 be offset by funding out of target PO #25123B at \$938,000. The proposed reduction would cut 75% of a program that has helped 90% of the young people served improve their academic achievements and reduce their subsequent juvenile justice involvement.
- We are concerned about the elimination of treatment slots in the \$50,000 reduction to PO #255154, Sun Alcohol, Tobacco & Other Drug Services. We note that \$131,000 is also slated to be cut from PO #25094 (Family and Youth Addictions Treatment) and we worry that with enacting both of these reductions, we may be cutting too deeply and negatively impacting youth

who are not eligible for the OHP too severely. We believe that children who aren't covered by the Oregon Health Plan should receive drug and alcohol treatment services.

In regard to new in target strategic investments, we support the \$76,000 funding for PO #25000, Research and Evaluation Analyst.

Among other out of target program offers, we support funding the following:

- PO #25056A, Crisis Assessment and Treatment Center Capital-\$1,900,000 (O.T.O). It's our understanding that funding this program this year would cost \$750,000 less than funding it next year. Since we regard the Crisis and Treatment Center as essential, it should be funded this year to avoid paying more next year.
- PO #25056B, Crisis Assessment and Treatment Center Operations-\$375,000, is the accompanying program offer to the above. It provides the money for operating the Center for the last quarter of FY10-11.
- PO #25040C, Domestic Violence Victims Services/DIVERT-\$139,000, provides funding for a collaborative response to cases with a high risk of on-going abuse, stalking or of potentially lethal outcome.
- PO #25040D, Domestic Violence Victims Services/Safe Start-\$163,000, provides funding for the continuation of the Safe Start Program, which provides collaborative domestic violence victims services to 100 families involved with child welfare.

We realize that this is a substantial list of recommendations for funding. However, we've reached a point in the recent history of the county where most of the less crucial programs have already been eliminated and there is nothing else left to cut but those programs that are essential. The human services that the county provides are unduplicated and the recipients of those services are the most vulnerable among us. That is why we are asking you to find the funding for the program offers recommended above. Thank you.

Sincerely,

The DCHS CBAC:

Steve Weiss, Chair
Patricia Backlar
William Barnes
Lenore Bijan
Mark Lewinsohn
Shalonda Menefee
John Richmond
David Thompson

Department of County Human Services

MULTNOMAH COUNTY OREGON

Joanne Fuller, Director

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**Citizen
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Committee**

Members:

Patricia Backlar

William Barnes

Lenore Bijan

Mark Lewinsohn

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John Richmond

David Thompson

Steve Weiss

May 25, 2010

Dear Board of County Commissioners,

Good morning. I'm Steve Weiss. I'm chair of the Department of County Human Services Citizen Budget Advisory Committee. My testimony today is a supplement to our CBAC's March 15th budget recommendations which all of you should have received by now.

First of all, we want to express our heartfelt thanks to Chair Cogen for his prioritization of human services in his May 13th proposed Executive Budget. In doing this, he has honored this Commission's traditional role in protecting and preserving human services programs for the County's most vulnerable residents. We hope that you will all vote to support Chair Cogen's budget.

Among those program offers that haven't been funded, our CBAC is recommending that funding be restored for two offers slated for partial reductions due to County General Fund restraints. They are Program #25094-Family and Youth Addictions Treatment Continuum-\$131,000 and Program #25154-Alcohol, Tobacco & Other Drug Services-\$50,000. In both these programs, youth alcohol and drug addiction outpatient treatment slots are slated to be reduced because more children are expected to receive coverage under the Oregon Health Plan. However, our CBAC members still feel that these slots need to be restored for the coming fiscal year.

Our CBAC also wants to express its concern over the increasingly ominous situation at every level of government in regard to budget shortfalls that will likely have disastrous effects on human services across the nation. Congress is growing increasingly reluctant to engage in deficit spending that would include a bailout for the states, despite the fact that the vast majority of states, including Oregon, are facing major budget gaps. And the November elections may result in a Congress next January that will be far less friendly to social welfare programs than the Congress we have in place now.

Here in Oregon, we're currently facing a \$2.5 billion shortfall for the 2011-2013 biennium, including a combined \$1.6 billion shortfall for the Department of Human Services and the newly created Oregon Health Authority, which now includes the

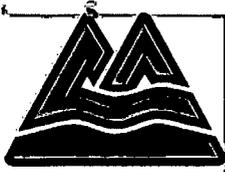
Addictions and Mental Health Division. Moreover, Gov. Kulongoski's reset Cabinet has predicted state budget shortfalls of \$2.3 billion for the 2013-2015 biennium, \$2.2 billion for the 2015-2017 biennium and \$2 billion for the 2017-2019 biennium. Unless the necessary steps are taken at the state level to raise revenue to offset these predicted budget shortfalls, the likely absence of a federal bailout, combined with the constitutional mandate almost all states have for a balanced budget, will produce budget cuts to human services that will be absolutely devastating. This would be a situation unprecedented in my lifetime, which now spans 67 years.

In closing, our CBAC would like to thank all of you for the commitment you've shown to protecting and preserving human services in Multnomah County. We very much appreciate all of your efforts in this regard and hope that you will continue this tradition in the difficult years to come.

Sincerely,

The DCHS CBAC:

Steve Weiss, Chair
Patricia Backlar
William Barnes
Lenore Bijan
Mark Lewinsohn
Shalonda Menefee
John Richmond
David Thompson



CITIZEN
BUDGET
ADVISORY
COMMITTEE
Members

Anthony
Granados

Ginger
Martin

Rebecca
Parker

Elaine
Premo

Clinton
Taylor

Department of Community Justice

MULTNOMAH COUNTY OREGON

501 SE Hawthorne Boulevard, Suite 250

Portland, Oregon 97214

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(503) 988-3990 fax

CBAC 2011 Annual Report

Submission Date: May 14, 2010

The following outlines the feedback and recommendations of the Citizen Budget Advisory Committee to the Central Budget Advisory Committee regarding the FY11 Proposed Budget for the Department of Community Justice.

Section 1: Process

The first meeting of the Department of Community Justice (DCJ) Citizen Budget Advisory Committee (CBAC) was held on February 25, 2010. The committee met four times to familiarize themselves with departmental activities and review FY11 budgetary proposals. During this period, the committee met with several key DCJ staff members including: Scott Taylor, Director; Dave Koch, A.D. Juvenile; Carl Goodman A.D. Adult Services; Karen Rhein (Administrative Analyst); and Kim Bernard (Policy and Communication Manager). In addition, the committee reviewed several documents related to DCJ budget and operations including the FY10 Program Summary and FY11 Proposed Budget. Lastly, the Committee toured the juvenile detention facility and had the opportunity for a question and answer session with Craig Bachman (DCJ Juvenile Services).

The committee has experienced challenges with participation and attendance. Of the original six committee members, two have opted to leave the committee prior to submitting the 2011 annual report. One member left at the start of the committee's formation while another member left in the two weeks prior to the report. Regardless, the four remaining committee members are in shared agreement on their final budget recommendations.

Section 2: Budget Recommendations and Major Changes

The Committee has had opportunity to review both the department's proposed budget and the Chair's budget recommendations. The priority areas identified by our committee were:

- ✓ Adult Housing Services
- ✓ Addiction Services for Offenders
- ✓ Juvenile and Adult Gang Services

The committee feels a commitment to these three areas is an important component to providing and maintaining public safety. Therefore, **CBAC fully supports the Chair's decision to restore these services in the FY11 budget.**

Section 3: Emerging Issues

It is the committee's understanding that DCJ had already experienced significant reductions in staffing due to cuts sustained in prior years. For example, 22 FTE have already been cut in the areas of Juvenile Services Division and Adult Services Division. While we understand the budgetary challenges associated with the recent economic downturn, CBAC will be monitoring the department's activities with great interest to determine if the staffing reductions are being properly managed and that public safety is not being compromised.

We would also like to underscore our concerns about gang violence in our community and request that funding levels for gang prevention and gang suppression activities be continued or even enhanced, if possible. We would like to routinely receive information to monitor progress in this important area.

As a group, we toured the juvenile detention center and noted that the electronic monitoring system appeared aging and obsolete. We would support a one-time expenditure to update the system. This action will likely alleviate a potential staff safety issue in the future. The longer the wait for the upgrade, the more likely there will be an incident involving a malfunction in the system.

Section 4: Recommendations

Both DCJ and current CBAC members are in agreement that membership of the committee needs to be revisited and that new recruitment strategies are required to maintain a robust and active committee. We recommend that at least three new members be recruited. We also recommend that a sub-set of both current and previous committee members be interviewed to determine how to best structure participation to increase interest and involvement in CBAC's activities.

**Citizen Budget Advisory Committee
Multnomah County Sheriff's Office
Fiscal Year 2011**

**Report to the Multnomah County Commissioners
March 15, 2009**

Introduction

The Citizen Budget Advisory Committee (CBAC) to the Sheriff's Office is a program of the Multnomah County Citizen Involvement Committee (CIC). Both the CIC and CBAC are independent of the County and therefore are in a unique position to provide input to the Sheriff's Office and the Board of County Commissioners. We enjoy our opportunity to learn about the County budget process, how the Sheriff's Office manages its budget, and the operations of the Sheriff's Office. We equally enjoy being able to share our independent and educated voice with the Sheriff and his staff, and well as being utilized by other officials in the County.

The Citizen Budget Advisory Committee to the Sheriff's Department meets ten months out of the year, twice a month, and is assisted by Budget and Finance Manager Wanda Yantis, Captain Drew Brosh, and Office Assistant Lynette Hanson. This year, we regularly met with and were advised by many knowledgeable members of the Sheriff's Office:

Sheriff Daniel Staton has met with us on a regular basis over the last few months, and has given us valuable insight into the budget management and structure of the Sheriff's Office, this year's Grand Jury Report, and other emerging issues.

We met at Inverness Jail with the Agency Training Unit, where we discussed the complexities of non-lethal and lethal weapons training for officers, and were given hands-on training in taser usage.

Former Sheriff Skipper and Undersheriff Tom Slyter briefed us on the changes brought about by last year's 12% budget cuts and their influence on services.

Fiscal Specialists Sharon Lowell and Brad Lynch gave us detailed insight into the budget and contract administration, and discussed how the Sheriff's Office bills and exacts payment from other County and Federal offices.

As a result of our regular interaction with a wide array of individuals essential to the functioning of the Sheriff's Office, we feel that both the Sheriff's Office and the Board of County Commissioners can greatly benefit from our perspective as informed members of the voting public.

Major Changes:

Under this year's 4% budget constraint exercise, 118 beds at Inverness Jail are out-of-target Program Offers. This brings the total to 1249 beds, which is half the number of beds that were open ten years ago. Last year's 12% cut to the Sheriff's Office budget meant that not only were ongoing services thinned, but many had to be simply eliminated. Last year's reduction of services coupled with this severe decline in beds signals a threat to public safety, so there really isn't room to cut 4% of the Sheriff's Office budget this year.

The course that last year's budget took may have a significant effect on this year's salary negotiations. Last year, 343 members of the MCSO took a pay freeze. These included 52 Exempt Staff and Managers, 91 members of the Deputy Sheriff's Association (DSA), and 200 MCSO members of Local 88. With the exception of the Special Investigations Unit (SIU) being restored to the DSA, none of the 1.7 million saved by these Sheriff's Office pay freezes went back to the Sheriff's Office for restoration of positions. This makes it much more difficult to request pay freezes for this year's budget, freezes which would likely eliminate the need to dangerously thin services by 4%.

Recommendations/Concerns/Praise:

Last year, as mentioned above, almost none of the money saved by Sheriff's Office pay freezes came back to the Sheriff's Office, and in fact went to restore cuts in Health and Human Services. While we wholeheartedly believe in the work done for the community by Health and Human Services, we are concerned that there is a lack of understanding of how essential the Sheriff's Office is to our community's well-being.

The Sheriff's Office is not an organization that hunts "bad guys" and locks them up, and is therefore a necessary evil; it is the fundamental social service provider—responsible for public safety--without which a society cannot function. The Sheriff's Office runs task forces to protect citizens from elder abuse, domestic violence, human trafficking, theft, violent crime, and many other social problems. It runs work crews to help keep inmates active, social, and productive, so that they might re-enter society at some point, and is responsible for keeping citizens safe on our numerous rivers and in urban areas.

The Sheriff's Office is a valuable social service, and dramatically constricting its budget over the past two years, after ten years of steady funding decreases, will have a negative effect on our community.

The Warrant Task Force was originally purchased in October 2007 with a General Fund Contingency. Under this year's 4% constraint exercise, it is one of the programs that unfortunately must be considered as out-of-target. This task force is essential to serving misdemeanor and felony warrants so that future crimes may be prevented. As of February 1, 2010, there are about 7,000 outstanding felony warrants, as a result of lack of resources to arrest wanted subjects. After ten years of declining Sheriff's Office funding, and after last year's 12% cuts, eliminating this program will exacerbate an already growing problem.

Other program offers that must be considered out-of-target to meet the 4% constraint include funding for elder abuse detectives, river patrol, patrol, and dorms 4 and 5 of Inverness Jail. Budget constraint exercises can be productive and helpful, but not when services as essential as these must be eliminated.

We feel strongly that the Sheriff's Office cannot suffer another cut this year. After almost all money saved by last year's Sheriff's Office COLA freezes did not come back to the MCSO, it will be difficult to approach employees for more pay freezes. We recommend that all bargaining units be approached for freezes this year, not just those within the MCSO, and that if the Sheriff's Office does agree to COLA freezes this year, that all money saved by these agreements be applied to MCSO programs.

Emerging Issues:

We discussed this year's Grand Jury Report at length, and were disturbed by certain key misunderstandings within it. The Report criticized the Sheriff for not choosing to opt out of SB1145, and for choosing expensive inmate health care within the Corrections division. It seems that those involved in the Grand Jury Report were unaware that in no way are decisions regarding SB1145 or inmate health care up to the Sheriff; even if he wanted to opt out of 1145 or choose a new health care system, he absolutely does not have the ability to do so.

We were also concerned by the math used in the Report to determine how expensive MCSO jails are to run, and whether the US Marshal's compensation of the Sheriff's Office for housing Federal prisoners was adequate. Essentially, the total cost of jail infrastructure and operations was tabulated, and divided by the number of beds. The conclusion was then reached that the US Marshal does not adequately compensate the MCSO for taking on its prisoners. This simple math does not differentiate between marginal and fixed costs (fixed costs being money that the Sheriff's Office must spend to operate the jails regardless of whether or not it houses US Marshal prisoners).

We all know that the same numbers can be shifted around to reach widely differing conclusions. Comparisons between MCSO costs and those of other Sheriff's Offices are far more difficult than the Report suggests. As Sheriff Staton pointed out in his response to the Grand Jury Report, some cost methodologies used by other area Sheriff's Offices do not include health services costs, transportation costs, or costs of treatment programs, to name a few. Including or excluding even one of these items in a cost assessment can make a difference in the millions of dollars.

In part because of this tabulation of costs, and because of attributing responsibility for SB1145 and Corrections health care incorrectly to the Sheriff, the County Chair has suggested that the running of Corrections should be taken away from the Sheriff's Office. This seems like a poorly-conceived decision to us-- a rash action in response to a not very clearly understood or articulated problem, and one that would create very expensive new layers of government. Training programs, uniforms, and certain infrastructure that is currently shared by the Sheriff's

Office and Corrections would have to be duplicated, and at great cost. Even just a uniform change could prove expensive. A few years ago, the Sheriff's Office had to undertake a change in uniforms, and the cost of this change approached \$300,000.

In addition, the Sheriff is statutorily charged with responsibility for Corrections. It would make no sense for the Board to run the Corrections division while responsibility for anything that occurred within the jails lay with the Sheriff.

Many have pointed out that the Grand Jury Report has made the same recommendations to the Sheriff's Office over the last few years, and that the Sheriff's Office has not listened. It is disturbing to us as well that the same faulty math cited above, coupled with the serious misunderstandings about the various responsibilities of the Board and the Sheriff, have been present in the last few Grand Jury Reports. We think that this may have to do with the fact that, though the citizen participants in the Report change yearly, the Grand Jury Report is run and written by the same two Deputy DAs year after year.

Members' Names:

Ethan Atkinson
Julie Cieloha
Ray Davenport
Jim Lasher
Phyllis Thiemann
Ron Saroff



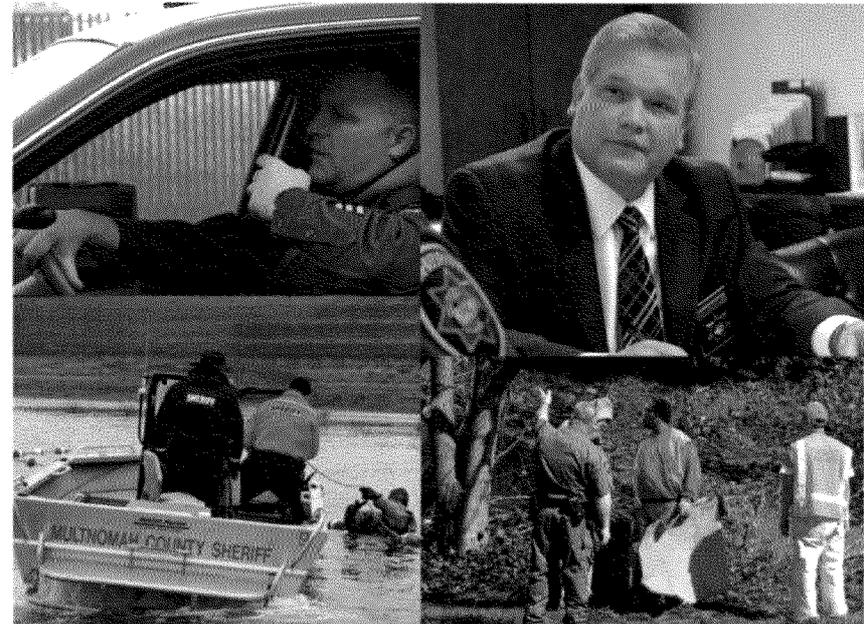
MCSO FY 2011 Proposed Budget

WAVE 2 – Policy, Operational Challenges & Issues

DRAFT PRESENTATION

(to be updated before May 25th)

1. Agenda Overview and Introductions
2. CBAC Report
3. Challenges & Issues
 - a. Policy
 - b. Organizational & Operational
 - c. Other
4. Follow-Up





2. Citizens Budget Advisory Committee

"The effect of a representative democracy is to refine and enlarge the public views, by passing them through the medium of a chosen body of citizens, whose wisdom may best discern the true interest of the nation...."

James Madison

CBAC Members:

- Ethan Atkinson
- Julie Cieloha
- Ray Davenport
- Jim Lasher
- Ron Saroff
- Phyllis Thiemann



3. Challenges & Issues

One Time Only Funded Programs

MCSO FY11 One Time Only Funded Programs

Division	Program #	Name	General Fund	FTE
Corrections	60033B	MCSO Gresham Temporary Hold	\$138,437	1.04
Enforcement	60065B	MCSO River Patrol Constraint Restoration	\$140,863	1.00
Enforcement	60068B	MCSO Warrant Task Force Constraint Restoration	\$221,393	2.00
Enforcement	60076B	MCSO Domestic Violence Enhanced Response Team	\$55,753	0.60

TOTAL \$556,446 4.64



3. Challenges & Issues

Flexible Solutions to Emergency Releases

- Propose a budget note that would provide an earmark to access contingency funding in order to avoid Emergency Population Releases
- Consider incremental short duration double bunking at the Justice Center to mitigate spikes in bed requirements that exceed our authorized capacity



3. Challenges & Issues

RAU Data Analyst Impact

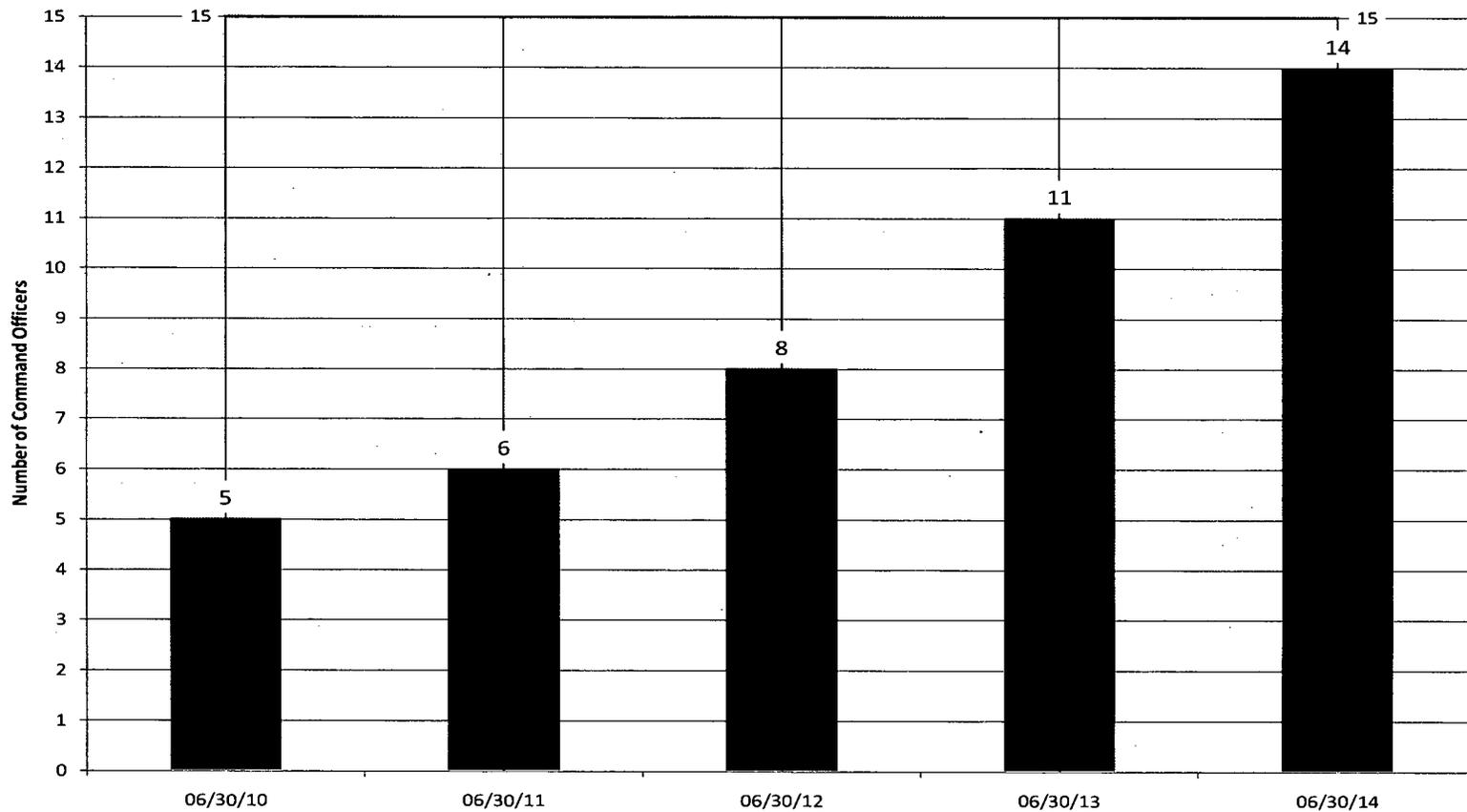
- The Data Analyst performs 25% of the current Research and Analysis Unit workload
- The position is key to financial data collection and formatting for SCAAP, BVP and other grant applications
- The Data Analyst is an integral part of the Sheriff's Office monthly reporting used for data driven decision making and multi-agency communication
- This position prepares data for response to public information requests as well as gathers information for the Corrections Grand Jury



3. Challenges & Issues

Pending Retirements

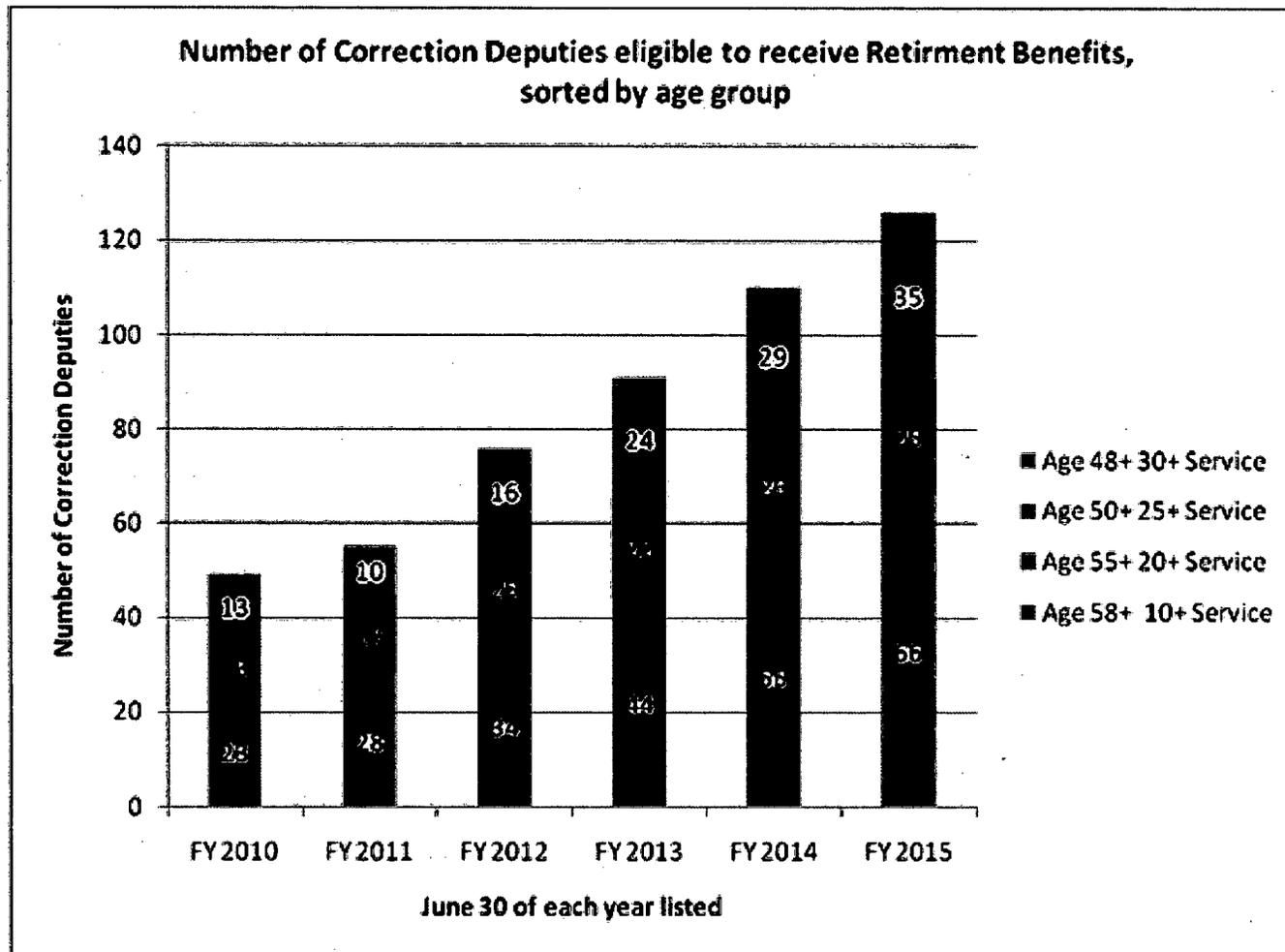
Number of Correction Command Officers eligible for Retirement by Fiscal Year
15 Total Officers May 18, 2010; Data Source: SAP





3. Challenges & Issues

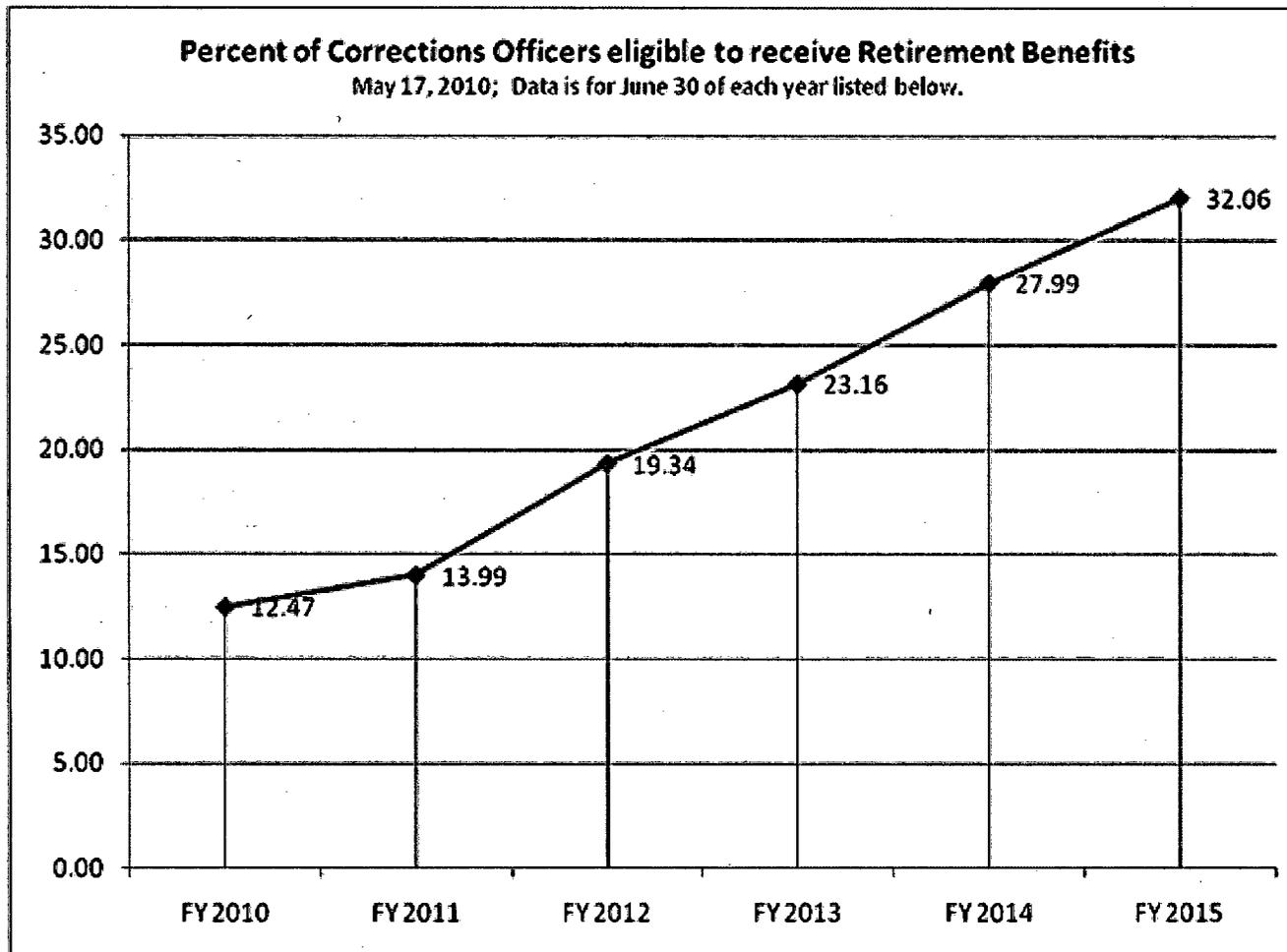
Pending Retirements





3. Challenges & Issues

Pending Retirements





3. Challenges & Issues

Inmate Re-entry Strategies

- Develop a Strategic Plan through the Re-entry Council to transition inmates back to the community
- Access grant opportunities through the strategic plan
- Re-institute a Work Release Center



MCSO FY 2011 Proposed Budget

WAVE 2 – Policy, Operational Challenges & Issues

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3. Challenges & Issues

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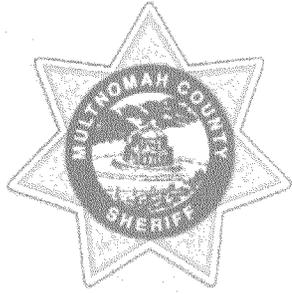


3. Challenges & Issues

OTO Follow Up Questions

- The RPU is involved in numerous events which require planning and risk management to include 4th of July, Fleet Week/Rose Festival, Summer holidays, dragon boat races, Waterfront park events.
- RPU received the 2009 OSMB Program of the Year Award
- RPU received the 2009 OSMB Volunteer of the Year Award





3. Challenges & Issues

OTO funding for River Patrol





3. Challenges & Issues

OTO funding for River Patrol

- Potential RPU Willamette Office relocation project



5/25/2010

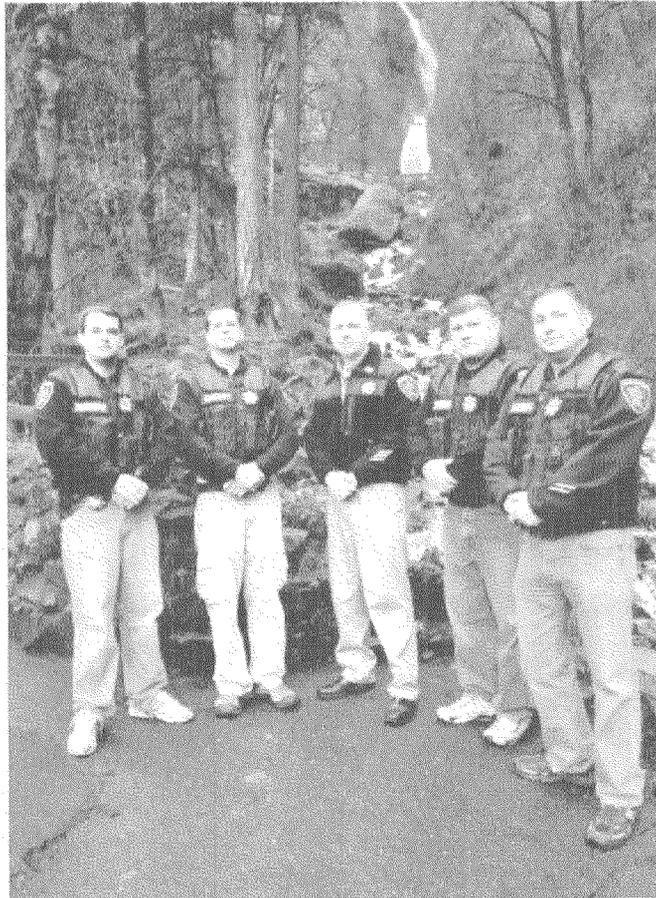
Multnomah County Sheriff

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3. Challenges & Issues

OTO funding for Warrants Strike Team



- In 2009, the county saw a reduction of 10% in overall warrants
- Arrested over 1200 warrant offenders of which 82 arrests are for original Measure 11 offenses

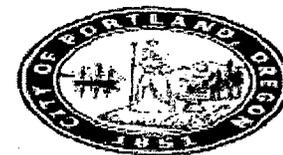
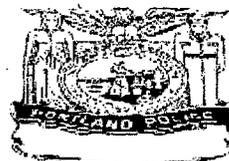


3. Challenges & Issues

OTO funding for DVERT

Domestic Violence Enhanced Response Team (DVERT)

- The mission of DVERT is to increase victim safety and offender accountability in high risk/high lethality domestic violence cases through collaborative interagency response that considers the needs of victims and their children. The goal of intervention is to stop the assailant's violence. The focus of the intervention is to protect the victim(s) from further harm
- DVERT accepts referrals for possible prioritization. Referrals are high-risk domestic violence cases that would benefit from a coordinated, multidisciplinary response including investigation and prosecution of crimes in Multnomah County



Catholic Charities

Providing Help, Creating Hope

RAPHAEL HOUSE
ESTABLISHED 1978



**Legal Aid
Services of
Oregon**



**Volunteers
of America**
OREGON





3. Challenges & Issues

Impact of Reduction of RAU Data Analyst Position

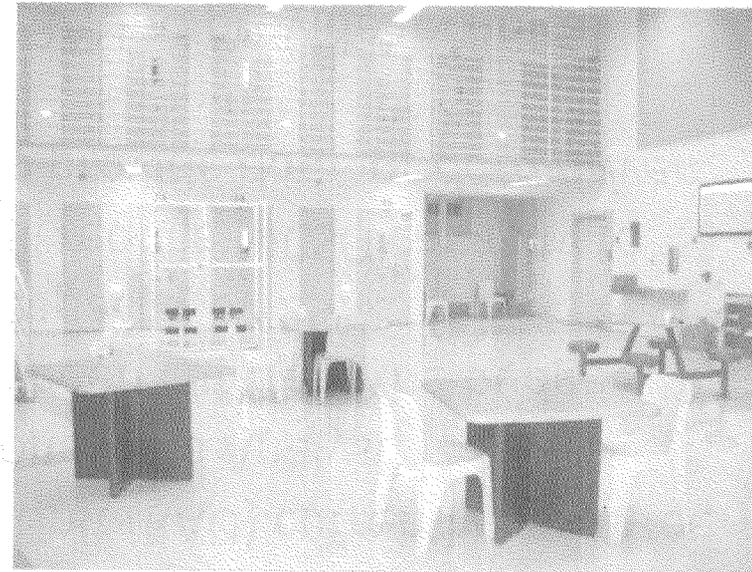
- The MCSO Resource Analysis Unit (RAU) currently has three Senior Research Analyst and one Data Analyst
- The Data Analyst position has been cut from the budget. This reduces the unit's personnel capacity by 25%.
- The cutting of this position will reduce MCSO capacity to produce the data necessary to provide data for *data driven business decisions*
- Some diminished capacity for RAU to provide technical assistance on databases to other MCSO and County work units
- Possible delays in reporting on Performance Measures
- Possible delays in satisfying ad hoc requests for data, especially those from the public and those not directly business related



3. Challenges & Issues

Flexible Solutions to Emergency Releases

- Propose a budget note that would provide an earmark to access contingency funding in order to avoid Emergency Population Releases
- Consider incremental short duration housing options to mitigate spikes in bed requirements that exceed our authorized capacity



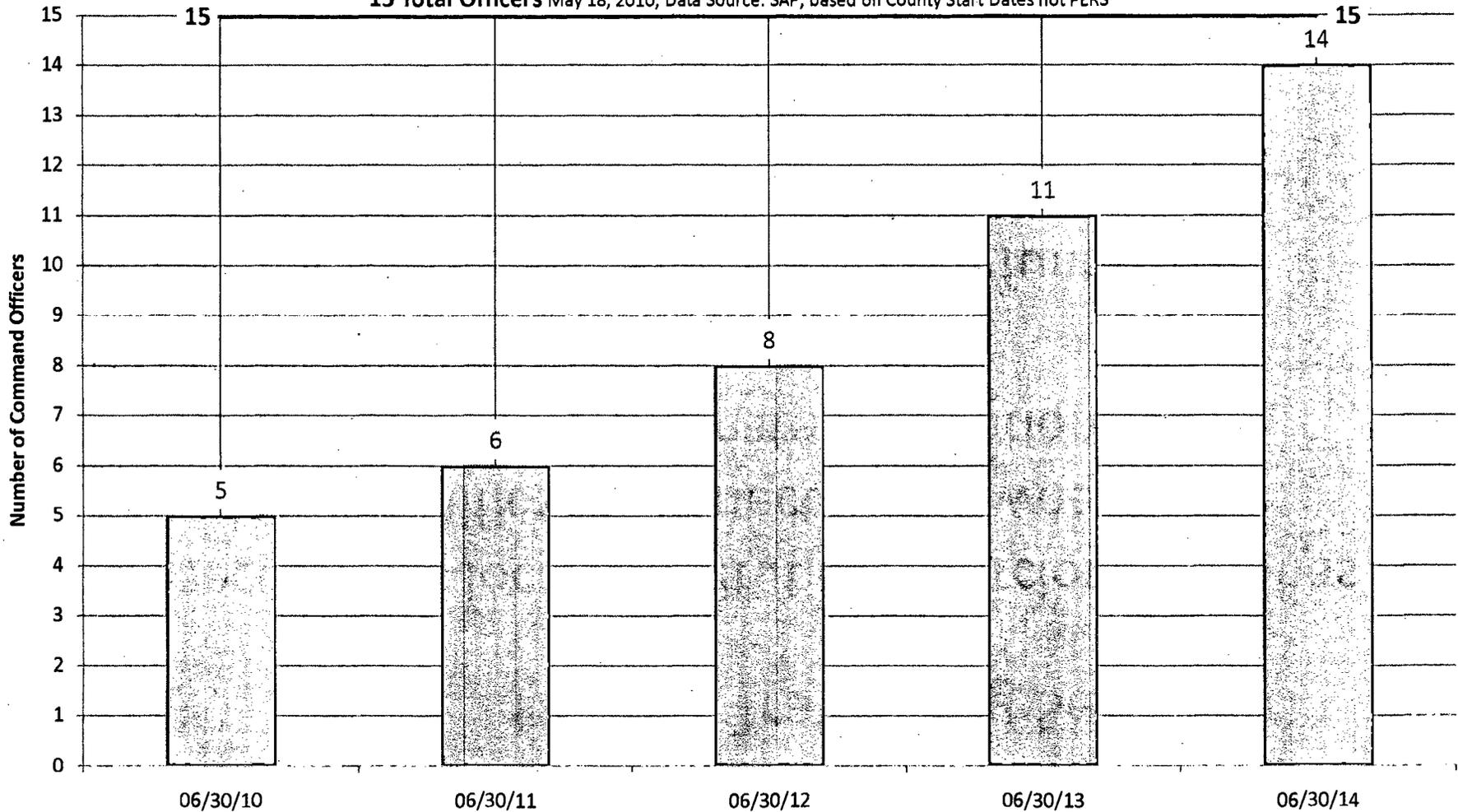


3. Challenges & Issues

Pending Retirements – Corrections Command

Number of Correction Command Officers eligible for PERS Retirement by Fiscal Year

15 Total Officers May 18, 2010; Data Source: SAP; based on County Start Dates not PERS





3. Challenges & Issues

Human Trafficking Sergeant

- Prosecution of local prostitution/coercion cases has revealed a significant connection between predominately female inmate populations and human traffickers
- Carryover remaining 2010 dedicated funds to support a one year Sergeant's position targeting human trafficking intel in jail system



3. Challenges & Issues

Human Trafficking Sergeant

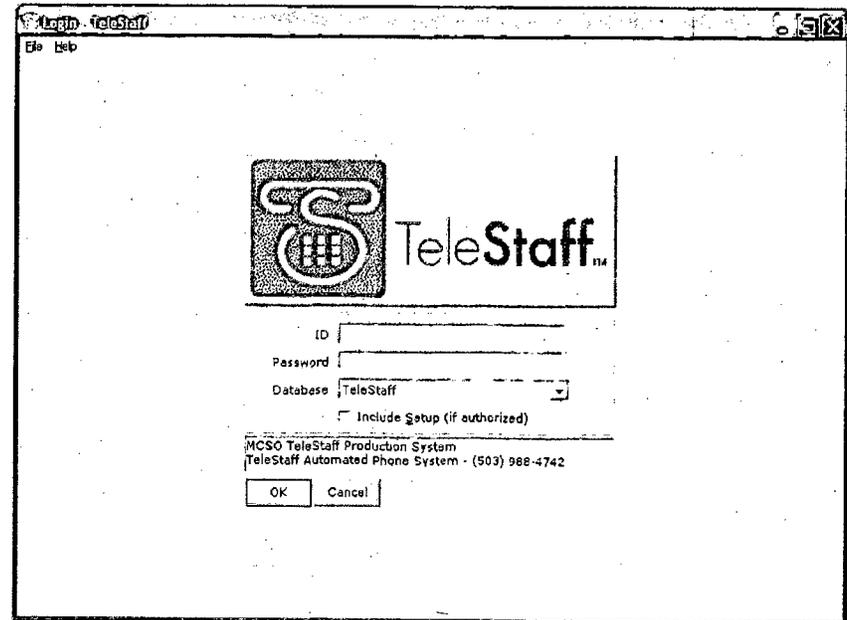
- Sergeant establishes intel module for data tracking in inmate management system and develops screening instrument to quickly identify at-risk populations in jail
- Independent, collaborate and analytical work develops mid-management leadership KSA





3. Challenges & Issues TeleStaff/LEDS Sergeant

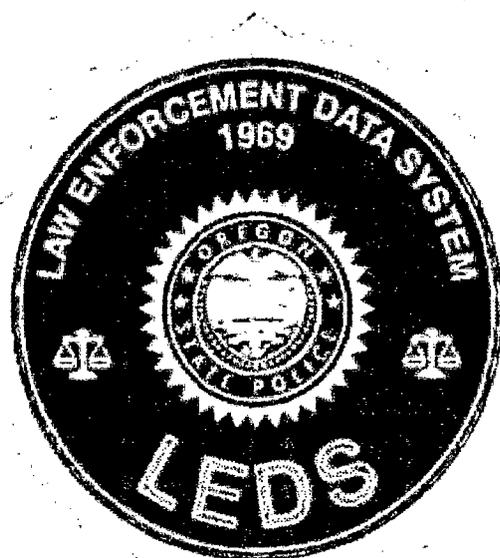
- Scheduling system technical support necessary but currently unfunded
- Carry over remaining 2010 dedicated funds to support technical support position
- Further develop TeleStaff user base into “self scheduling” activities for leave request and reporting –freeing supervisors/managers from clerical activities





3. Challenges & Issues

TeleStaff/LEDS Sergeant



- Additional duties include agency-wide LEDS certification administration establishment and development of scheduling and reporting in Training Unit
- Project management responsibility ideal for development of mid-management KSA

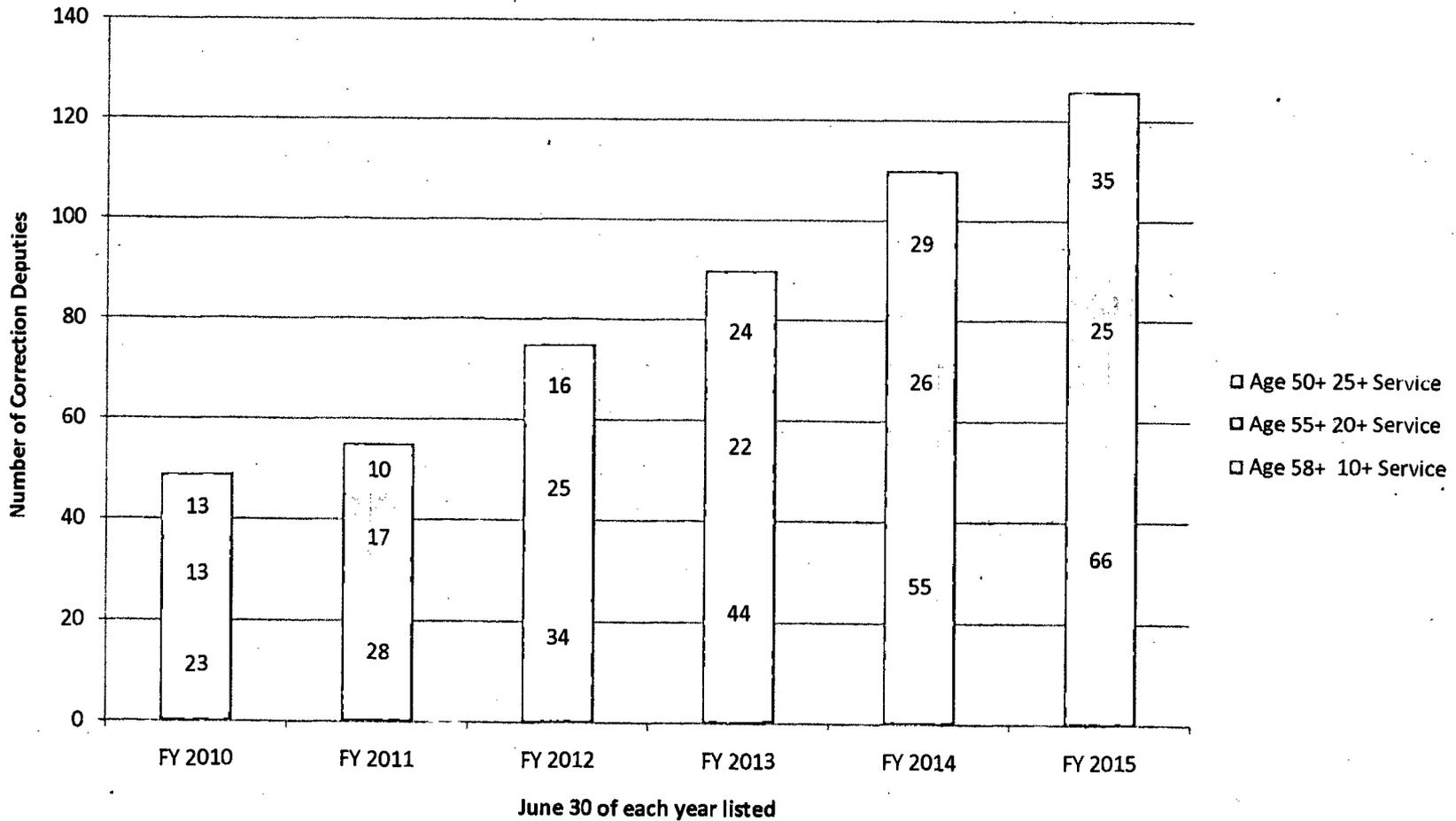


3. Challenges & Issues

Pending Retirements - Deputies

Number of Corrections Deputies eligible to receive PERS Retirement Benefits, sorted by age group

May 18, 2010; Data Source: SAP; based on County Start Dates not PERS; 393 total Correction Deputies in data set





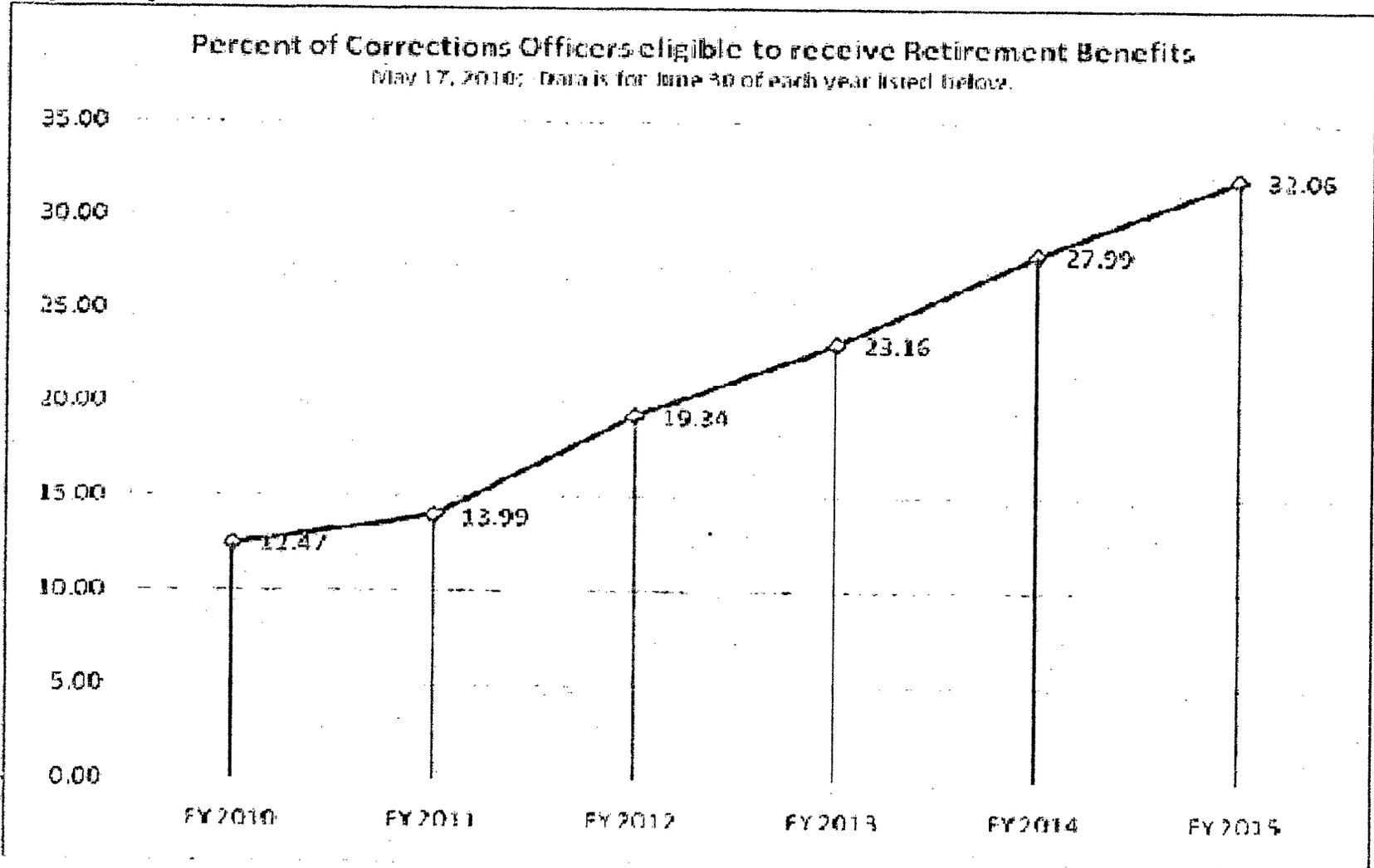
3. Challenges & Issues

Retirement/Recruitment

- Recruitment - 93 of every 100 applicants fail process from initial application to placement of eligibility list
- Costs - \$36,391 to train and equip a new Corrections Deputy
- Projected Retirements –Over 30% (or 130) MCCDA members eligible in 5 years
- Seniority Effect –budget constraints resulting in FTE reductions always affect members lowest in seniority



3. Challenges & Issues Pending Retirements





3. Challenges & Issues

Women's In-Custody Program

- Women's opportunity for program participation is limited due to ratio of men to women in custody (traditionally 8 to 1)
- Cuts from last budget cycle reduced Women's Work Crew Opportunities in kitchen and laundry (balance male/female sentenced offenders)
- Current availability of women and cooperative program with Animal Control



3. Challenges & Issues

Women's In-Custody Program

- Women's Work Crew will maintain grounds and provide cleaning for kennels and catteries
- Work time credit can reduce sentences by 30% - a 7 member work crew can generate up to 70 system beds in a month
- Purchase opportunity cost is \$139,000 for FY2011





3. Challenges & Issues

Inmate Re-entry Strategies



- Develop a Strategic Plan through the Re-entry Council to transition inmates back to the community
- Access grant opportunities through the strategic plan
- Re-institute a Work Release Center



**DISTRICT ATTORNEY'S OFFICE
CITIZEN'S BUDGET ADVISORY COMMITTEE
2010/2011**

Process:

The committee has met with the District Attorney and his budget staff on two occasions during this budget process starting in November of 2009. The CBAC discussed general fund revenue outlook, constraint target and preparations for submitting the 2010/2011 budget documents. In addition, the CBAC discussed the potential countywide impact of a significant general fund revenue shortfall and generally how the District Attorney's Office will approach submitting their program offers.

In January 2010 the CBAC and District Attorney Michael Schrunk reviewed the constraint numbers and a preliminary on how many positions would be needed to be eliminated to meet the constraint.

In March the CBAC met and discussed recent revenue projections, developments on the State budget passage of measures 66 and 67, reviewed the proposed list of cuts the DA will submit in their proposed budget and identified areas of concern they wanted to address in their report.

Major Changes:

As requested by the County's budget office, the District Attorney's Office has submitted budget Program Offers that reflect a 4% general fund reduction in the overall operation. With 85% of the budget attributed to personnel costs the vast majority of the \$715,000 reduction will come from position cuts. The office will lose 5.5 Deputy DA general fund positions unless restorations are made.

In addition to general fund reductions the DA Office will also suffer the loss of 2.5 grant funded Deputy DA positions next year unless new grant funding is acquired. These grant positions are by grants provided by the Portland Police Bureau and target prostitution on 82nd and chronic offenders in the downtown core area.

The CBAC believes that the District Attorney and his staff have taken a thoughtful approach in identifying the proposed reductions. He has long said that his office will always address the most serious crimes and offenders and the budget proposal reflects this philosophy. The cuts are spread across the organization so as not to create a shortage or hole in the prosecution of high, medium or low level offenders. The program taking

the largest reduction in terms of FTE is the Property Crime Unit which would lose 1.5 Deputy DA position, while the unit suffering the greatest workload impact because of the cut is MDT Child Abuse. The Deputy DA3 position cut to this unit would reduce its prosecution capacity by 25%.

Recommendations/Concerns:

The District Attorney's Office is a lean organization that continues to keep citizens safe by holding those who commit crimes in Multnomah County responsible for their actions. The CBAC strongly believes that, when taken with the cuts from the past two years, these proposed reductions are too deep.

The proposed budget will take away resources in areas that will have effect of lengthening case processing time and their ability to dedicate sufficient time to the prosecution of individual cases. This is especially true for the MDT Child Abuse Unit, Domestic Violent Unit and Gang Unit. Having the capacity to do little more than triage these complex cases puts victims, potential victims and children at risk. The CBAC recommends that these three positions be restored.

The CBAC understands that quality of life crimes are considered to be lower on the continuum of crime in term of seriousness. These crimes however impact the livability and business atmosphere in our communities. The impact of offenders who commit property and misdemeanor crimes goes beyond just the immediate victims, it impacts all citizens within the community. For this reason the CBAC believes the Board should restore cuts to the Property Crime and Misdemeanor Units.

Emerging Issues:

The overriding issue is and will continue to be the sagging economy and its impact on resources that would otherwise be available to Public Safety, Health and Human Services and other valuable programs and services the County provides.

While statistics show that the crime rate is down in Multnomah County it would be easy to say job well done now lets turn our attention and our resources elsewhere. But this action would be both irresponsible and dangerous. While it is difficult to predict if or when the crime rate will again begin to rise, one thing is certain, continuing to take away necessary resources from the District Attorney and other Public Safety partners will undoubtedly hasten that increase.

District Attorney CBAC members:

Bob Pung- Chair	Mike Greenlick	Dave Simpson	Michael Delman
Dick Wegner	Irwin Mandel	Earl Sykes	Cliff Wamack



**Multnomah County
District Attorney's Office
Citizen's Budget Advisory Committee**

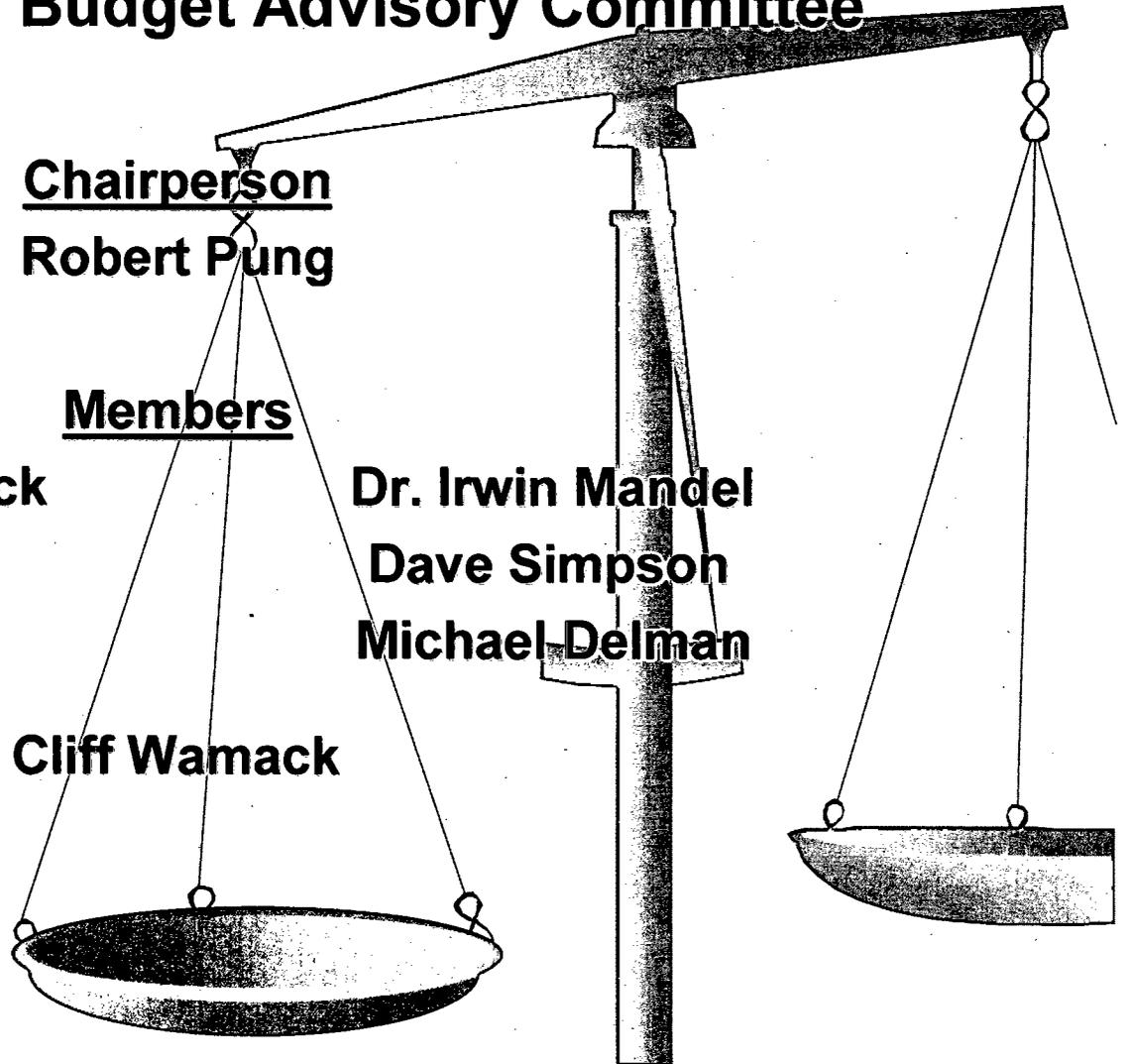
Chairperson
Robert Pung

Members

**Michael Greenlick
Earl Sikes
Dick Wegner**

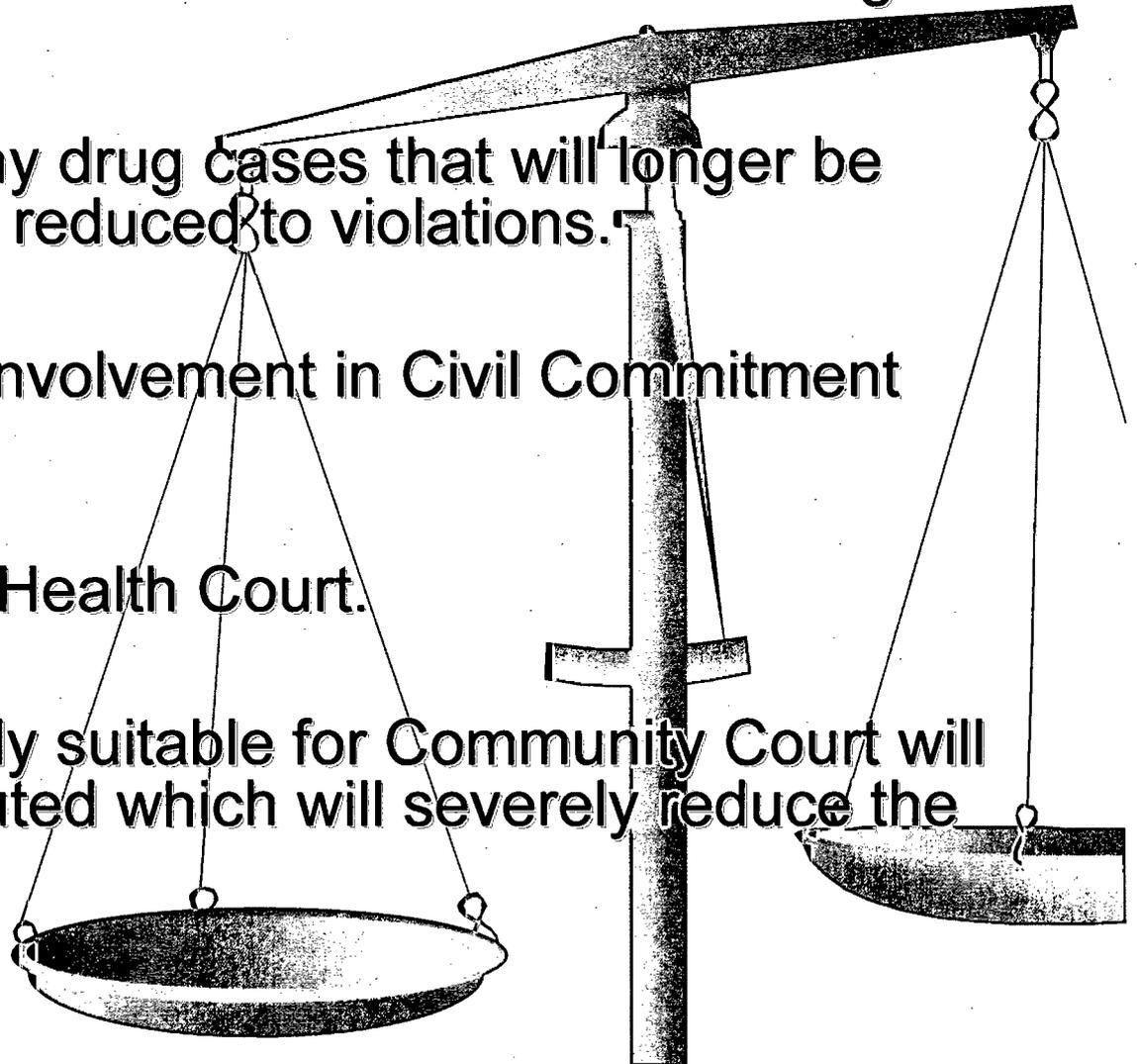
**Dr. Irwin Mandel
Dave Simpson
Michael Delman**

Cliff Wamack



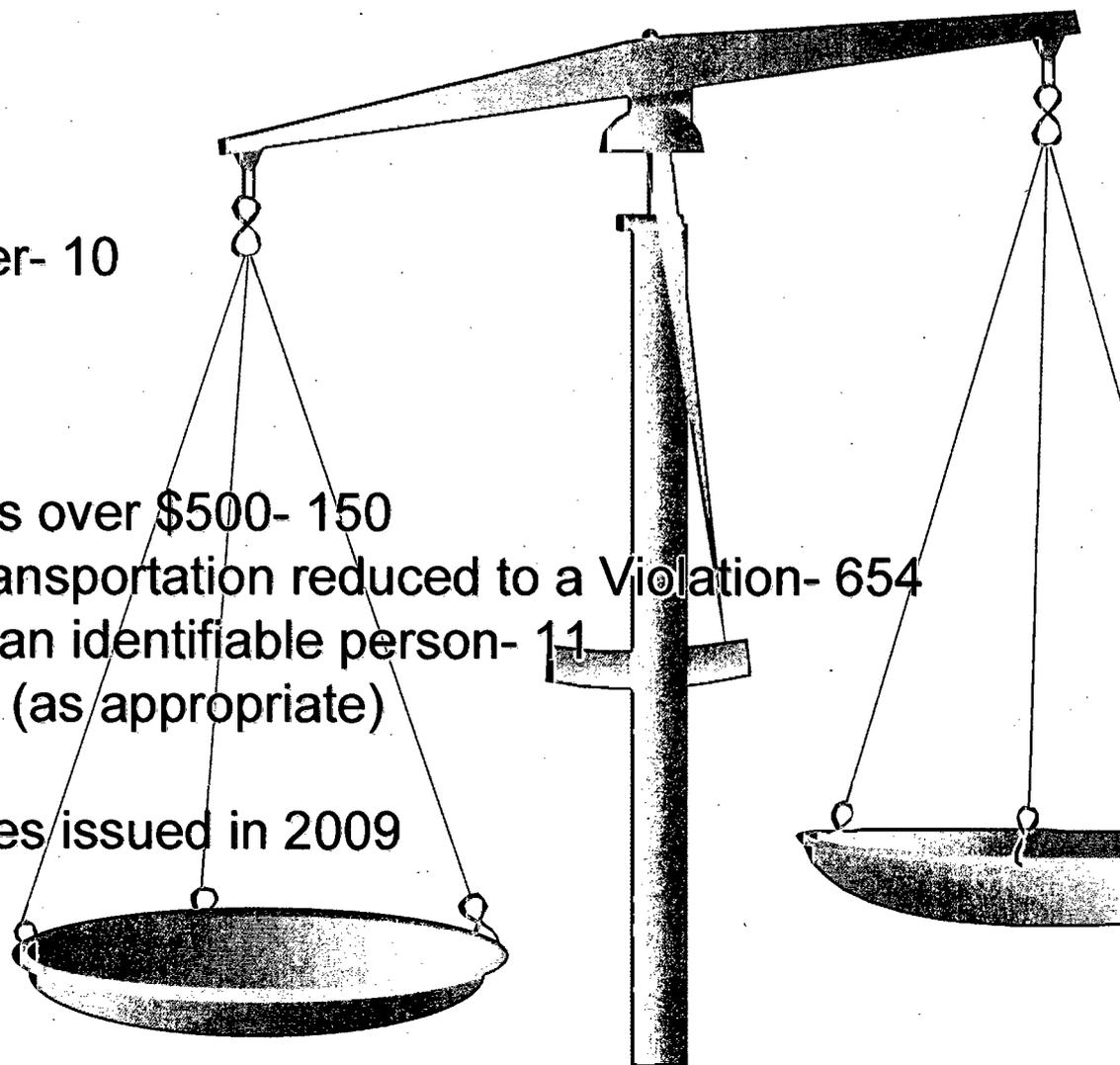
Implementation Plan

- Have identified Misdemeanor crimes that will no longer be prosecuted.
- Have identified Felony drug cases that will no longer be prosecuted or will be reduced to violations.
- No District Attorney involvement in Civil Commitment Hearings.
- Reduction to Mental Health Court.
- Most cases previously suitable for Community Court will no longer be prosecuted which will severely reduce the scope of this Court.



Misdemeanor Crimes Still Prosecuted

- DUII- 2588
- Assault IV- 170
- Sex Abuse III- 15
- Menacing-169
- Violation of Stalking Order- 10
- Firearms Offenses- 57
- Public Indecency-60
- Prostitution- 220
- Misdemeanor Theft cases over \$500- 150
- Interfering with Public Transportation reduced to a Violation- 654
- Recklessly Endangering an identifiable person- 11
- Other Aggravated Cases (as appropriate)
- * numbers represent cases issued in 2009



No longer able to prosecute the following crimes:

Theft of less than \$500 from citizens and businesses- 3350

Possession of small amounts of Cocaine, Meth, Heroin- 435 misdemeanor and 150-200 felony cases

Trespass (Commercial, Residential)- 850

Minor Assaults/Harassment- 178

Disorderly Conduct- 1427

Criminal Mischief/Graffiti- 205

Reckless Driving- 110

Hit & Run property damage- 256

Driving while Suspended- 498

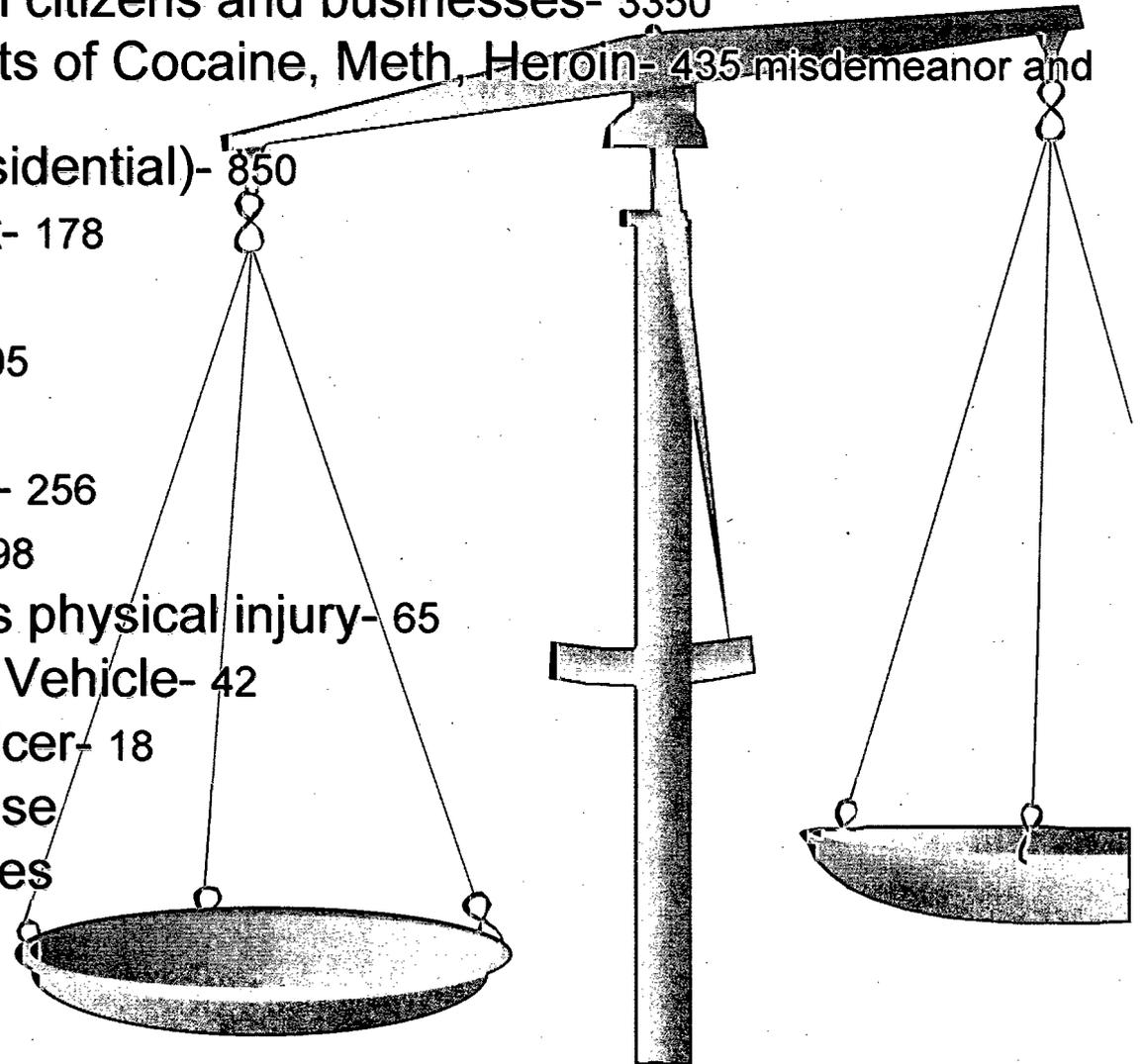
Resist Arrest unless there is physical injury- 65

Unlawful Entry into a Motor Vehicle- 42

Attempt to Elude Police Officer- 18

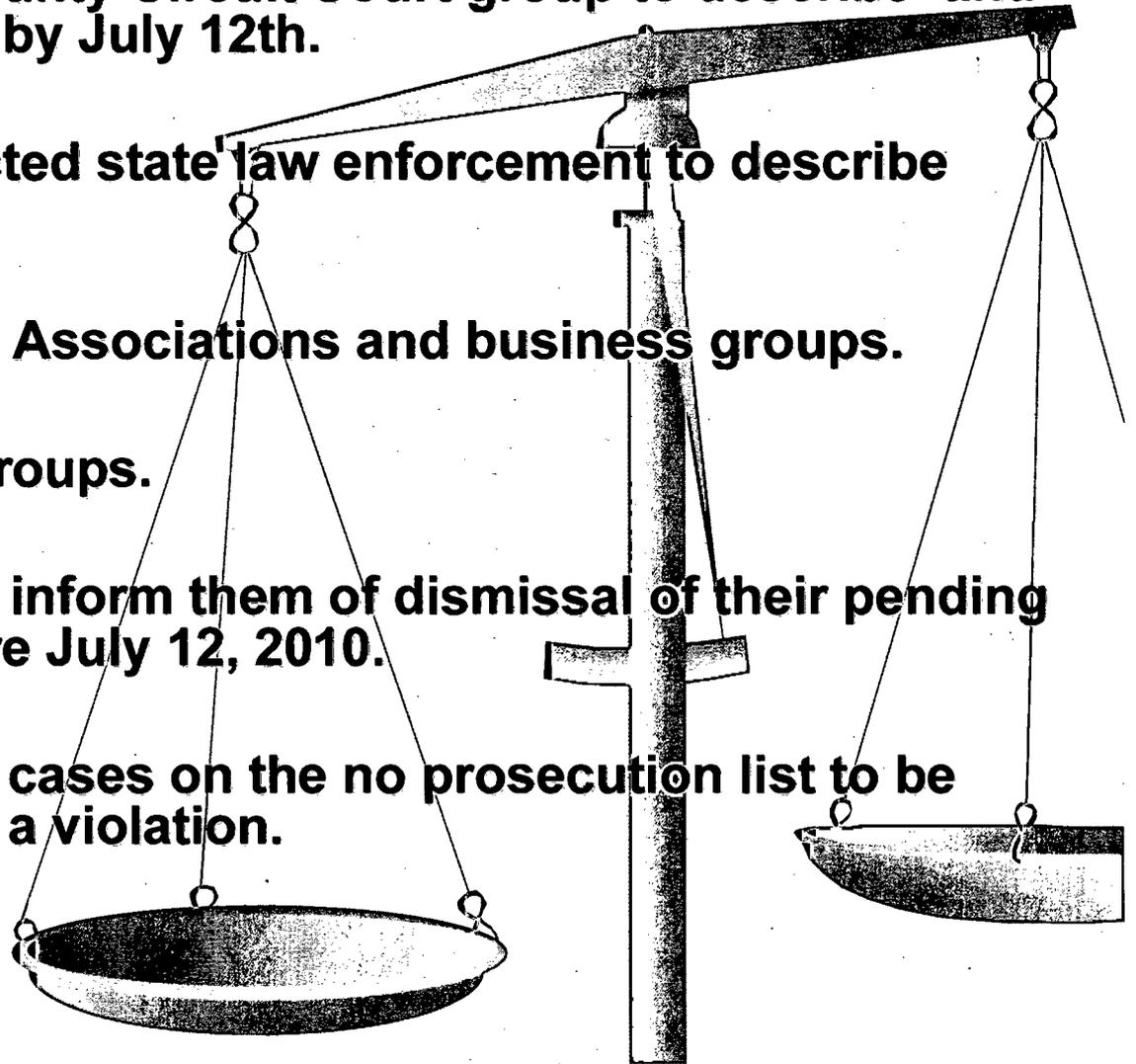
City of Portland Code Offense

All other misdemeanor crimes



Operational Requirements

- **Meet with Multnomah County Circuit Court group to describe and then implement the plan by July 12th.**
- **Meet with local and affected state law enforcement to describe implementation plan.**
- **Meet with Neighborhood Associations and business groups.**
- **Meet with crime victim groups.**
- **Contact crime victims to inform them of dismissal of their pending cases. Must occur before July 12, 2010.**
- **5,688 pending & warrant cases on the no prosecution list to be dismissed or reduced to a violation.**



District Attorney Staff Impact

- **Multnomah County budget proposed cut: \$588 K.**

Reduce Misdemeanor Trial Unit by 4 Deputy DA's.

Reduce Misdemeanor Intake by 1 Deputy DA.

Reduce felony Property Crimes Unit by 1 deputy DA.

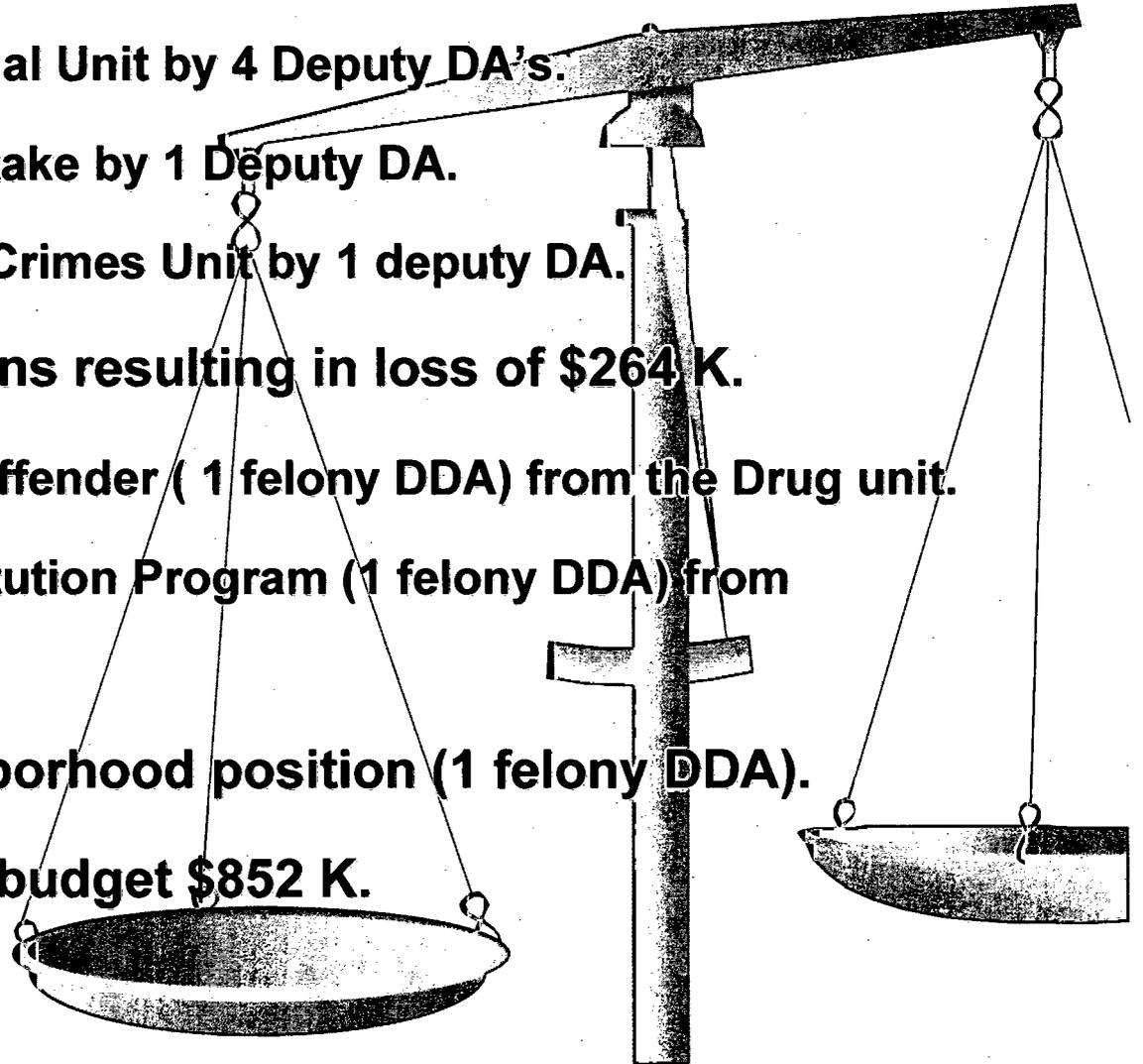
- **Anticipated Grant expirations resulting in loss of \$264 K.**

Elimination of Chronic Offender (1 felony DDA) from the Drug unit.

**Elimination of the Prostitution Program (1 felony DDA) from
Neighborhood Unit.**

- **Restoration of N/NE Neighborhood position (1 felony DDA).**

- **Total loss of revenue from budget \$852 K.**



Public Safety Partners Impacted

- **Victims**
- **Citizens**
- **Business Community**
- **Courts**
- **County Law Enforcement Agencies**
- **Sheriff's Office Corrections**
- **Community Justice**
- **Public Defender**



GOOD AFTERNOON CHAIR COGAN, AND COMMISSIONERS, MY NAME IS BOB PUNG AND I AM THE CHAIR OF THE DISTRICT ATTORNEYS, CITIZEN BUDGET ADVISORY COMMITTEE, I AND ALL OF MY FELLOW MEMBERS, ALSO, EXPRESS OUR CONCERN, OVER THIS YEAR'S BUDGET CUTS, AND I AM SURE MANY CITIZENS IN MULTNOMAH COUNTY WILL BE VERY TROUBLED, WHEN THEY SEE JUST WHAT WILL HAPPEN WHEN THERE IS NO JUSTICE FOR MISDEAMOR CRIMES.

IN MOST CASES NOT EVEN A CITATION WILL MEAN ANYTHING, AND COMMUNITY COURT MAY JUST GO AWAY. THE DA'S OFFICE WILL NOT HAVE THE PERSONNEL TO PROSECUTE MANY OF THE LIVABILITY CRIMES AGAINST OUR CITIZENS.

WE REALIZE OUR ECONOMY IS TIGHT BUT JUSTICE HAS A BIG LOSS WHEN OUR CITIZENS AND COUNTY CAN NO LONGER DO ANYTHING ABOUT, GRAFFITI, CAR BREAK-INS, AND MANY OTHER CRIMES, THAT CAUSES PROBLEMS WITH OUR BUSINESS, AND NEIGHBORHOODS.

WE NEED TO FIX THE JUSTICE SYSTEM IN THIS COUNTY, SO THAT IT HAS A STRONG YEARLY BUDGET IT HAS TAKEN MANY YEARS SINCE CAPS WERE PUT ON THE MONEY SOURCES THAT KEPT OUR COUNTY GOING.

WE ALSO NEED TO MAKE SURE THAT THE GRANTS THE DA'S OFFICE GETS ARE NOT LOOKED AS PERMANENT FUNDING.

THE COUNTY HAS A CORE RESPONSIBILITY TO FUND PUBLIC SAFETY AND PROSECUTION SERVICES, AS IT SHOULD NOT RELY ON GRANT FUNDING WHAT GENERAL FUNDS SHOULD.

THE CBAC KNOWS THAT YEAR AFTER YEAR WE AND THE OTHER DEPARTMENTS IN THE COUNTY HAVE HAD TO WORK IN A THRIFTY WAY TO WORK WITH YEAR AFTER YEAR REDUCED BUDGETS. I DON'T THINK THAT ANYBODY KNOWS WHAT THE ANSWER IS BUT OUR CITIZENS DESERVE BETTER. IT IS THE RESPONSIBILITY OF GOVERNMENT TO PROTECT THE CITIZENS IN OUR COUNTY. THAT IS WHY THIS BUDGET IS INTOLERABLE AND WE TRUST THAT THE COUNTY COMMISSIONERS WILL CONTINUE TO RECOGNIZE AND SUPPORT THE DISTRICT ATTORNEYS OFFICE AS THEY ALWAYS HAVE. BECAUSE WE CAN NOT HAVE ANYTHING LESS THAN EFFECTIVE PROSECUTION SERVICES. THANK YOU



Michael D. Schrunk, District Attorney

1021 SW Fourth Avenue, Room 600

Portland, OR 97204-1193

Phone: 503-988-3162 Fax: 503-988-3643

www.mcda.us

M E M O R A N D U M

To: Chief Deputy District Attorney Rod Underhill
From: Jeff Howes; Fred Lenzser, Wayne Pearson, Sr. DDAs
cc:
Date: May 24, 2010
Subject: Plan for implementing reduction in Misdemeanor Unit staffing

In response to your request, the plan for implementation of the reduction of 5 misdemeanor deputy district attorneys is set out below. In 2009, there were 15,961 misdemeanor cases referred to the Misdemeanor Intake Unit for review. Of those, 13,117 were issued and prosecuted. After implementation of the changes described below, the number of cases that will be issued and prosecuted (based upon the supposition that there will be neither a dramatic increase nor decrease in criminal activity in Multnomah County) will be 4,576. There will be, however, a qualitative difference in the cases that are issued – they will be (1) the most serious and most complex type of misdemeanor charge, (2) they are the charges that are most likely to be resolved by jury trial.

Misdemeanor Trials

The Misdemeanor Trial Unit is currently staffed by eight level-one DDA's and one Senior DDA. Monday through Thursday are trial days, during which the unit must cover a minimum of 6 courtrooms (Criminal Procedure Court (CPC), Gresham District Court, and four trial courtrooms), and civil commitments. In each of the four trial courtrooms, there may be as many as six misdemeanor trials set. The four trial courtrooms are dedicated (i.e. they must handle a docket of misdemeanor cases). On any day, without advance warning to the Misdemeanor Trial Unit, the CPC may have up to four additional courtrooms available to try misdemeanor cases. The loss of 4 deputies in the Misdemeanor Trial Unit will result in the inability to prosecute misdemeanor crimes at or near the current level. The primary focus will become those crimes that, by statute, must be prosecuted (i.e. Driving Under the Influence of Intoxicants), and those crimes which present the most immediate threat to the safety of the public (i.e. sexual abuse, assault, violation of stalking protective order, and firearms charges).

Implementation of the following changes will begin in mid-June and will be complete by July 12, 2010:

1. Civil Commitment Hearings – Daily civil commitment hearings will no longer be staffed.
2. Gresham District Court – Staffing must continue at current level.

3. Trial Courtrooms - An agreement must be reached with Presiding Judge Jean Kerr Maurer that the Misdemeanor Trial Unit be available to cover a pre-determined number of dedicated trial courtrooms on each trial day. This number will be dictated by the number of available deputies and student interns.

The utilization of court certified student interns will become critical to the ability of the Misdemeanor Trial Unit to cover trial courtrooms. However, using certified law students to cover trials normally handled by deputies will present numerous problems. The level of supervision necessary will impact the ability of the unit supervisor to adequately oversee other functions. The cases they will be required to try are the most complex misdemeanors. For example, the majority of DUII defendants are represented by retained attorneys (as opposed to public defenders), the pre-trial motion litigation may take more than one full day, the issues litigated (before and during trial) include questions regarding the admissibility of scientific evidence, expert testimony, crash reconstruction, etc. Assigning a 2nd or 3rd year law student to prosecute a resist arrest or assault case, will lead to the greater likelihood of civil litigation after trial.

The use of certified law students in this capacity will enable expanded courtroom coverage as follows:

Jan. 15 – April 15:	3 dedicated courtrooms with the possibility of one additional
April 16 – May 30:	2 dedicated courtrooms with the possibility of one additional
June 1 – August 15:	4 dedicated courtrooms with the possibility of one additional
August 16 – Sept. 14:	2 dedicated courtrooms with the possibility of one additional
Sept. 15 – Nov. 30:	3 dedicated courtrooms with the possibility of one additional
Dec. 1 – Jan. 14:	2 dedicated courtrooms with the possibility of one additional

Currently, if there are 2 or more trials ready to be tried in any of the four trial courtrooms, and if the CPC court is able to find an additional courtroom in which the case may be tried, the case will be sent to the additional courtroom, requiring the appearance of a DDA. It is also critical to note that this staffing plan does not take into account intermittent staffing reductions due to complex misdemeanor cases (those taking more than 2 trial days), attorney vacations, attorney sick-days, off-site training opportunities (i.e. National Advocacy Center, Oregon Department of Justice, etc) and the fluctuating nature of the availability of certified law students (due to school commitments and vacations).

4. CPC Court – with fewer cases issued, and fewer trials, the duties of the CPC Deputy will be reassigned to the person supervising the Misdemeanor Trial Unit. This will result in lower levels of supervision, training, and oversight of the members of the Misdemeanor Trial Unit.

5. Mental Health Court – currently the supervisor of the Misdemeanor Trial Unit (a Senior Deputy DA) manages the DA's Office participation in the Multnomah County Mental Health Court. As a result of the reduction in the types of charges issued as misdemeanors, the current stream of clients/cases entering into Mental Health Court will be drastically reduced.

Misdemeanor Intake

Currently Misdemeanor Intake is staffed with 4 deputies, including the Senior DDA. Two positions are required to staff the arraignment courts, JC1 and JC4, both in the morning and in the afternoon. One person is also required to staff the diversion court hearings on Monday afternoons. This leaves 2 positions to do the issuing. There are 3 half-time intern positions allotted to Intake. Two of those positions are filled. The interns help cover the arraignment courts. As indicated above this intern staffing is an unreliable resource. Also the interns and a senior legal assistant are primarily responsible for issuing the thefts and store trespass cases and on occasion may issue some traffic. More training and supervision of the interns will be required if they are to screen more complex cases.

To accommodate the loss of one attorney at Intake, and the overall reduction in the number of deputies available to try misdemeanor cases, the following issuing policies will be implemented:

- A. Prosecution of the following charges will continue due to threat to public safety presented by this criminal conduct:
 1. DUII
 2. Sexual Abuse in the Third Degree
 3. Public Indecency or any exposure of genitalia in the presence of children
 4. Assault in the Fourth Degree
 5. Violation of a Stalking Order
 6. Menacing
 7. Recklessly Endangering another Person
 8. Interfering with Public Transportation (issued as a violation)
 9. Prostitution (see discussion below regarding issuance of Prostitution cases)
 10. Animal Abuse
 11. Theft and Forgery in the Second Degree (value \$500 or greater)
 12. Other aggravated cases

There are currently 3194 cases of this type pending.

- B. Prosecution of the following cases will be discontinued unless the case was aggravated. The names of the most common misdemeanors reviewed are set out below but the list would include any misdemeanor created by state statute or city or county ordinance.
 1. Theft or Forgery in the Second Degree (commercial or private – value less than \$500)

2. Misdemeanor Possession of a Controlled Substance – cocaine, methamphetamine and heroin. Involves possession of small amounts of these drugs.
3. Harassment
4. Trespass (commercial and residential)
5. Disorderly Conduct
6. Criminal Mischief
7. Hit and Run – property damage
8. Misdemeanor Attempt to Elude
9. Resist Arrest – If there is reckless injury, see Assault IV above. If there is intentional injury, refer for felony prosecution.
10. Driving While Suspended.
11. Any Portland City Code offense
12. Any other misdemeanor created by state statute or county code.

C. Pending and Warrant Cases – In order to implement this policy fully and to ensure that defendants are treated equally, it will be necessary to offer some of those defendants currently charged with crimes the prosecution of which will be discontinued, an opportunity to plead to violation-level offenses. The remainder will have to be dismissed. Additionally, we anticipate that this will necessitate that notices be sent in advance to the victims in those cases notifying of the dismissal and potentially involving hearings. There are currently 5688 cases of this type pending.

These changes are necessary to address the reduction in issuing capacity as well as the collateral reduction in courtroom coverage.

The reduction of prosecution will result in collateral consequences such as the inability to collect restitution for the victims of crime and the loss of revenue to the local governments from fine and statutory fees and assessments. Although no precise figure can be calculated, the amount could be substantial. Many of the cases being considered for no prosecution are Community Court eligible. Through the Community Court many people are directed toward needed social services and perform thousands of hours of community service. The substantial reduction in cases issued will eliminate the client base of the Community Court and deprive the community of the service hours now being provided.

In order to continue to prosecute the limited crimes listed above, including Prostitution, and in consideration of the County budget's addition of the North Neighborhood DA position, it will be necessary for the Neighborhood Unit to provide commensurate expanded coverage at Intake. Neighborhood DDAs would take over initial responsibility to issue all non-DUII cases wherever the case occurred. Additionally, Neighborhood DDAs would need to be available for coverage at Intake when needed for vacations and illness. This coverage change will occur notwithstanding the increase in community demands upon Neighborhood DDA time which will be brought about by the proposed cuts. Over the many years of providing Neighborhood prosecutors in our communities, it has become clear that neighborhood associations and business groups, with years of activism experience, become much more active and vocal when livability crimes rise. The crimes that are most cited as directly affecting public safety and livability are the very crimes that will no longer be prosecuted. This is particularly true for crimes involving

May 25, 2010

prostitution activity. From that experience, it is certain that the community concern over specific crime problems will rise thereby increasing the demand for solutions from the Neighborhood DDAs within a system which will only address livability crimes when they rise to felony levels.

DCM/DCS CBAC Report for FY2011

Process Overview:

This CBAC reviews the programs with both the Department of County Management (DCM) and the Department of Community Services (DCS).

We met in November to welcome new members and determine a meeting schedule and content. During January and February we met twice a month and interviewed both Department Directors and six program managers. Information received during these interviews form the basis of this report. In March we reviewed the information we received, formed recommendations and produced this report. Due to the timing of program offer submissions and the due date for this report, we were only able to review a very limited number of FY11 program offers.

We appreciate all the work County staff has done to assist and inform the members of this CBAC during this budget season.

In arriving at the attached recommendations we met with the following County staff:

Mike Waddell – DCM (CBAC support staff)
Jerry Elliott – DCS (CBAC support staff)
Sammuel Konadu – DCS (CBAC support staff)
Cecilia Johnson – DCS Director
Mindy Harris – DCS Interim Director
Kat West – DCM Sustainability Program
Mike Oswald – DCS Animal Services Program
Kim Peoples – DCS Road Services Program
Rich Swift – DCM FREDS Program
Tim Scott – DCS Elections Program
Karen Barnum – DCS Elections Program
Bob Thomas – DCM Facilities and Property Management Program

CBAC Committee Members:

Helen Williams (Chair)
Jill Hofmann
Paul Manson
Joe Marrone
Iris Newhouse
Nastassja Pace
Pamela Reeves

Major Changes:

There are no major changes to either department for FY11

Recommendations/Concerns:

Department of County Management

- Sustainability
 - This program is to be commended for providing a disproportionately large impact when compared to the relatively small staff.
 - The committee supports the program offer to fully fund the 2 FTE currently working in this program.
 - The committee supports funding Multnomah County Food Program at 2.0 FTE. The committee would like to see this program leverage its effort through the use and coordination of existing programs and organizations throughout the community.
 - The committee feels it is important for local governments to lead the way in sustainability efforts.

- Fleet, Records, Electronic, Distribution and Stores (FREDS)
 - The committee commends the FREDS Program in its efforts to leverage County resources by marketing and providing services to other jurisdictions where it demonstrates a clear benefit to the County. This includes providing fleet services to the State of Oregon and other jurisdictions.
 - The committee supports further study of providing fleet warranty maintenance services to other jurisdictions after an appropriate pilot study.

- Facilities and Property Management
 - The committee feels that the business process re-engineering work currently being done at Facilities and Property Management will provide positive results. It should be a useful model for other work groups to use throughout the County.
 - The committee supports the program offer for an additional FTE to operate the Facilities Recycling plan. This position should be responsible and held accountable for tangible improvements in Countywide recycling efforts through specific technical assistance and knowledge dissemination efforts and not devolve into a mere report generating activity

Department of Community Services

- Animal Services
 - The committee supports the program offers to raise pet registration fees, restore the current level of service at the Animal Shelter and enhance services per the City of Portland and Multnomah County Joint Taskforce recommendations.
 - The committee supports the program offer to open a Portland Adoption Center. This should be implemented only after further feasibility study. To reduce the impact to other programs, this should be done with the greatest feasible use of volunteers, partnerships with other organizations and use of donated private funds. In addition, the committee recommends a robust advertising campaign to increase the effectiveness of this adoption center. The committee would recommend restoring current levels of service at the Troutdale Facility over the new adoption center if the choice is required.

- Road Services
 - The committee commends the Road Services Program for its solicitation of public opinion through the 'Road Shows'.
 - The committee commends the Road Services Program in its efforts to leverage County resources by marketing and providing services to other jurisdictions where it demonstrates a clear benefit to the County. This includes providing striping services to other road agencies and chip seal services to the City of Portland.
 - The committee understands that the current transportation funding model's reliance on a gas tax does not meet the needs it is intended to address. The committee would encourage local, state and federal leaders to investigate and implement a new model.
 - The committee believes that water quality mandates are important but also understands that they usually do not come with additional resources and therefore are difficult to implement. However, these mandates can present a potential liability that can affect the entire County budget.

- Elections
 - The committee commends the Elections Program for its efforts to increase efficiency through the use of technology and encourages the Program to continue to explore possibilities.
 - The committee believes that it is not prudent to make further cuts to the Elections staff to meet constraint. Elections works with an amazingly small staff and its quality service is critical to public trust in the region. Since non-staff expenses are largely dictated by the size and type of election they are also not good candidates for

reduction. Therefore we believe the Elections budget should not be reduced.

- The committee would like for the Elections Program to continue to study an acceptable process to reduce the number of voters' pamphlets printed by offering voters the opportunity to view an online version instead of receiving a paper copy. This could be accomplished by an on line registration or the equivalent of an on line simple "Do Not Call" (in this case, "Do Not Mail" listing that many companies and agencies offer now. The CBAC recognizes that any such change can often cause community concern, especially access for persons with disabilities or those unfamiliar with or without access to the internet. But the demographics of the population coupled with technological changes make this a feasible planning activity.

Emerging Issues:

- The committee supports efforts to replace the current un-integrated and ad-hoc systems used to produce the County Budget with a more modern and integrated system.
- The committee feels it is very important to address bridge safety issues promptly and not defer maintenance. The committee also supports the selection or formation of a regional entity to be responsible for regional transportation assets, especially the Willamette River Bridges. However, this will require more research to understand potential consequences and governance issues associated with the change. In addition, public safety should not be neglected if the formation of this entity results in a protracted political and administrative delay.

FY11 Capital Budget Presentation Transportation



May 25, 2010

FY11 Capital Presentation

AGENDA

1. **Road Fund**
2. **Bridge Fund**
3. **Questions**

ROAD FUND

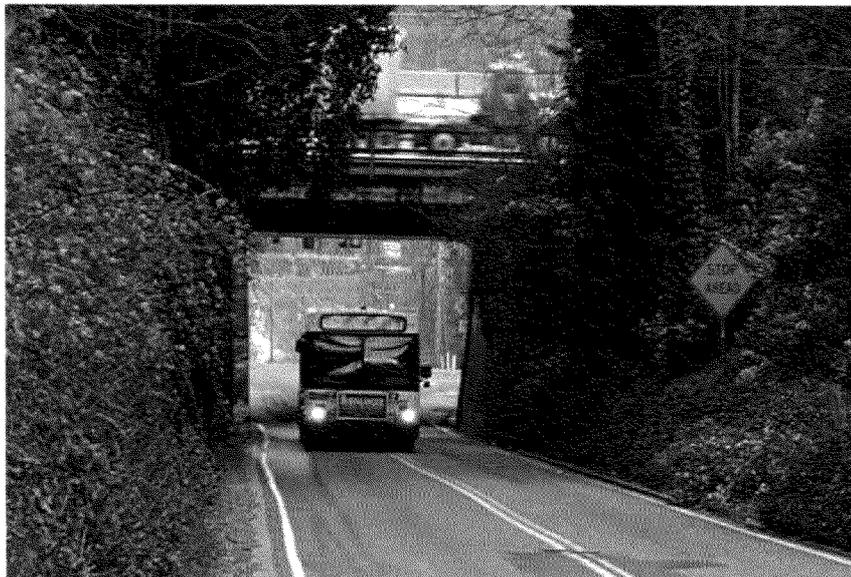


FY 2011 CAPITAL PROGRAM

223rd Ave Railroad Undercrossing Widen Roadway/Replace RR Bridge

County objectives to improve:

- Safety (20ft. 8in. opening)
- Substandard design (no sidewalks/bike lanes)



223rd Ave Railroad Undercrossing Widen Roadway/Replace RR Bridge

- Project Budget \$8.0 M
- Project Funding Sources
 - \$3.3 M Federal MTIP / STIP Grant
 - \$4.7 M Local Match County Road Fund
((\$4.6 Loan from ODOT Investment Bank))
- Current Status
 - Construction started: Feb 2009
 - Estimated completion: Late May 2010
 - FY11 begins Debt service

238th Ave Safety Project



Funding
\$326K Federal

- Hazard Elimination Program
- Improve sight distance and lane configuration
- Construction Summer 2011

ARRA Funded Projects

- Asphalt Overlay on County Arterial Roads (August 2010)
- Sidewalk Infill projects (completed May 2010)
- Cornelius Pass Road Safety Improvements (completed April 2010)

Road Fund

Capital Projects beyond FY2011

- Design Projects:
 - Wood Village Blvd Extension (Arata Rd to Halsey)
 - SE Stark St (257th Ave to Troutdale Rd)
- Construction TBD

Road Fund

Capital Projects beyond FY2011

Beaver Creek Culverts Fish Passage Project



Funding
\$1.0M Federal
for current phase

- Improve fish passage
- Working on additional funding

Willamette River Bridges

- **Capital Projects in FY2011**

Morrison Bridge Main Spans Rehabilitation



Funding
\$ 8.6M Federal
\$ 1.4M County Match
\$10.0M Total

- Safety and structural Issues
- Design in process
- Construction in 2011

Sellwood Bridge Replacement



Funding
Total project
estimated at
\$330M

- Federal Record of Decision – August
- Phase One of Debt Issue
- Design and Right of Way in FY11

Willamette River Bridges

Capital Projects Beyond FY2011

Broadway Bridge Paint

Funding
\$ 8.0M Federal
\$ 1.0M County Match
\$ 9.0M Total

- Paint Spans 2, 3 & 7 above deck
- Design begins in FY 2012

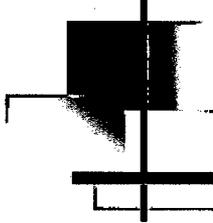


Seismic

- New Sauvie Island Bridge is only bridge up to current seismic standards
- Phase 1 versus Phase 2
- Burnside Bridge is Designated Lifeline Route – Phase 1 seismic complete
- Seismic upgrades have not been funded due to higher priorities assigned to basic needs

Summary of Transportation Capital

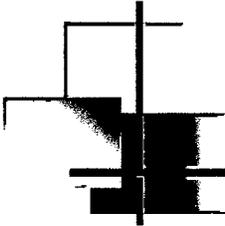
- Continuing with the highest priority projects
- Looking for other sources of funds



DCS FY11 Budget

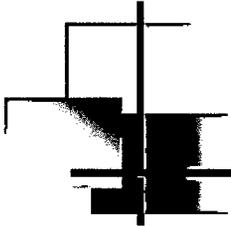
Policy and Organizational
Challenges and Issues

May 25, 2010



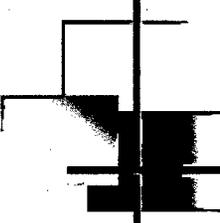
Agenda

- CBAC
- Challenges and Issues
- Questions



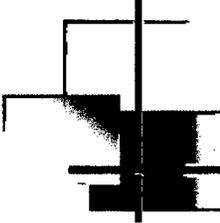
Challenges and Issues

- **Transportation Funding**
 - Funding Model
 - Deferred Maintenance
- **Sellwood Project**
 - County's largest dollar value project ever
 - Transparent process
 - Value to taxpayer
 - Cost and Schedule
 - Completing the Financing Plan



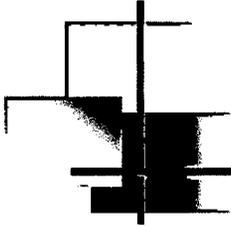
Challenges and Issues

- Animal Services
 - Identity
 - Messaging/Branding
 - Public awareness/Education
 - Fund Development
 - Shelter facility
 - Shelter location



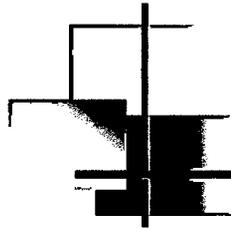
Challenges and Issues

- Elections
 - Most costs are outside the County's ability to control
 - Training new workforce
- Land Use Planning
 - Bonny Slope (Area 93)
 - Reserves project



Challenges and Issues

- Department Wide
 - Loss of institutional knowledge through retirements
 - Succession planning
 - Employee development while reducing budgets
 - Increasing diversity with a shrinking workforce and a high unemployment economy



Questions

GROW Lynda

From: GROW Lynda

Sent: Friday, May 21, 2010 7:01 PM

Subject: BCC AGENDAS FOR REGULAR, BUDGET WORK SESSIONS & PUBLIC HEARINGS MAY 25, 26 & 27, 2010

Greetings:

The Multnomah County Commissioners **meeting agenda** is posted online and is available Friday afternoons for the following week's packet on the web at:

<http://www.co.multnomah.or.us/cc/agenda.shtml>.

The Multnomah County Commissioners **budget calendar for FY 2010-2011** is posted on the web at: http://www.co.multnomah.or.us/cc/budget_hearings.shtml.

To view any items in the board packet, either click on the link at the top of the link mentioned above (on the agenda face page) or use this second link. The Agenda and items that will be considered are listed by sequential agenda numbers and part of the title of the item. You can view these pdfs at:

<http://www.co.multnomah.or.us/cc/WeeklyAgendaPacket/>.

Please note: Since we have several budget sessions, the packet link takes you to the page where you can choose Budget Work Session #3, or #4, or #5 or the Regular Board Packet. From there, you can see each individual item in pdf form.

If you have any questions, please contact us. Thank you.

Lynda J. Grow, Board Clerk
Marina Baker, Asst. Board Clerk
Multnomah County Commissioners
501 SE Hawthorne Blvd., Ste. 600
Portland, OR 97214-3587
(503) 988-3277 or (503) 988-3274
lynda.grow@co.multnomah.or.us
marina.baker@co.multnomah.or.us
<http://www2.co.multnomah.or.us/cfm/boardclerk/>

GROW Lynda

From: GROW Lynda
Sent: Thursday, May 20, 2010 8:28 PM
To: MCLELLAN Jana E; FORD Carol M
Cc: MADRIGAL Marissa D
Subject: reports rec'd

FIRST, I NOW HAVE ALL THE CBAC REPORTS; KATHLEEN SHOT THE LAST ONE TO ME THIS EVE

5/25

DCHS IN

NOTHING FOR DCM YET

LIBRARY IN

DCJ IN

MCSO IN

NOTHING FROM DA YET

DCS IN

5/26 MTG

GENERAL FUND – APR ONLY ??

NOTHING FOR HEALTH DEPT YET

IT IN

CAPITAL – APR ONLY ??

REGULAR BOARD MTG. 5/27

EVERY ITEM RECEIVED – ALL 12 ITEMS! WOO HOO!

I'VE ATTACHED THE AGENDA FOR YOUR REFERENCE; IT INCLUDES THE UPCOMING BOARD BUDGET CALENDAR AND I ADDED METRO EAST'S PLAYBACK SCHEDULE

THE ONLY PIECE I'M MISSING, IS KATHLEEN SHARED JULIE NEBURKA'S AGENDA FOR 5/27 – NON DEPARTMENTAL ITEMS. I WILL CHECK W/JULIE & SEE IF I AM

5/21/2010

GOING TO RECEIVE ANYTHING IN ADVANCE FOR THOSE FOLKS WHO ARE GOING TO BE INVOLVED THAT DAY.

LYNDA

**Lynda J. Grow, Board Clerk
Multnomah County Commissioner
501 SE Hawthorne Blvd., Ste. 600
Portland, OR 97214-3587
(503) 988-3277 or (503) 988-5274
lynda.grow@co.multnomah.or.us
<http://www2.co.multnomah.or.us/cfm/boardclerk/>**

MEMORANDUM

DATE: March 12, 2010

TO: County Chair Jana McLellan
Citizen Involvement Committee

FROM: Multnomah County Library Advisory Board (LAB)

SUBJECT: Library Advisory Board FY 2010-2011 Budget Report and Recommendations

The Library Advisory Board admires and appreciates Multnomah County Library's successes in serving our diverse community and the corresponding national recognition it has received. For many vulnerable people in our community, the library is a critical source of internet access, educational resources, and free, family-oriented activities. The library's outreach programs target services to children and their families who are most at risk, and the emphasis on collections and programs for immigrants has helped many new residents find their place in our community. Library staff has also shown themselves to be forward-thinking in terms of system and process improvements as evidenced by their attention to such advancements as materials movement enhancements and managing internal services costs. With increases in use across the board, the library has proven itself to be essential to the health of our neighborhoods during this difficult economic time while finding efficiencies and keeping costs down.

We celebrate two stellar honors the library received in 2009:

- Named one of five library recipients (out of over 122,000 libraries nationwide) of the 2009 National Medal for Museum and Library Services, the nation's highest honor for museums and libraries. The Multnomah County Library was specifically recognized for its services directed at foreign-born citizens, active seniors, and children.
- Named a five-star library, the highest ranking possible, by *Library Journal*, the nation's oldest and most respected publication covering the library field. This is the second consecutive year that the Multnomah County Library has received this honor.

PROCESS

In accordance with the ordinance that established the Library Board in 1990, the Library Advisory Board (LAB) serves as the Library's Citizen Budget Advisory Committee (CBAC). This 17-member, independent citizens group holds monthly meetings throughout the year. The LAB is well-educated on library operations, programs, policies, and priorities, as well as issues facing public libraries and the library's budget. A subcommittee of the LAB, the Finance Committee, was tasked with conducting an in-depth review of the library's budget and reporting back to the LAB. The Finance Committee met four times over the winter and has reported to the

LAB on a monthly basis. Library Director Vailey Oehlke and Deputy Director Becky Cobb attended these meetings and provided information, reports, and budget briefings for the Committee's review. The Finance Committee reviewed Director's priorities, past program offers, performance measures, internal service rates, cost center analyses, past budget-to-actual figures by program offer, library levy fund goals and forecasts, and General Fund constraint calculations. This review has informed the Finance Committee's assessment of the proposed library budget. The LAB has authorized the Finance Committee to submit this report on its behalf.

MAJOR CHANGES

We note two major developments that are taking place in the FY 2009-2010 budget: the completion of the new branch libraries in Kenton and Troutdale and the implementation of the first phase of the radio frequency identification technology (RFID) circulation and theft detection system. The opening of the new libraries meets a central goal of the 2006 voter-approved, library levy, and the RFID project positions the library to effectively support growing demand for circulation services in a cost-effective manner. In total, these projects represented \$5.8 million of one-time-only funds in the FY 2009-2010 budget. Although the completion of the RFID project will carry over into FY 2010-2011, the library's budget request is reduced overall due to the work that was completed on these projects in FY 2010-2011. The LAB supports these changes and the ongoing commitment of the library staff to meeting the goals of the library levy, discussed below.

RECOMMENDATIONS AND CONCERNS

Program Offers

The Library's FY 2010-2011 budget request represents the fourth year of the current five-year operating levy, approved by Multnomah County voters in November 2006. The Library's program offers/services reflect this voter decision. The levy language is in bold below:

- ***“Keep libraries open; maintain current hours and services at Central and neighborhood libraries. Maintain free access to information; update books and materials. Open planned libraries in underserved neighborhoods of East County and North Portland.”*** We believe that the program offers for the Central Library (80000), Regional Libraries (80001), and Neighborhood Libraries (80002) will sustain the current level of services and open hours, as well as provide for full-year operations of the new libraries in Kenton and Troutdale.
- ***“Continue books delivery to homebound seniors and nursing home residents.”*** We believe that the Adult Outreach program offer (80006) will continue these services as well as provide services to shelters, transition homes, jails, and adult foster care homes.
- ***“Continue programs for school age children, story hours for babies and toddlers, summer reading, literacy services for children in child care, programs for teens; help***

teachers and students use library resources; provide homework helpers to assist children with school work.” We believe that, in conjunction with the Central, regional and neighborhood library program offers, the Early Childhood Services (80004) and School Age Services (80003) program offers will adequately provide these services on an outreach basis.

The Finance Committee made detailed recommendations to library staff on performance measures for these and other program offers. We have observed an ongoing commitment by staff to continuously improve accountability in all service areas. We endorse the above program offers as consistent with the language and intent of the levy, and as strong contributors to the well-being and quality of life for county residents.

Budget Reductions

In the FY 2009-2010 budget request, the library made the following reductions in order to meet that year’s 12% General Fund constraint:

- \$41,860 from repairs & maintenance;
- \$108,889 from travel & training;
- \$500,000 from the Library’s book budget;
- \$1,362,411 from the Library’s carryover balance

For the FY 2010-2011 budget request, the reductions in repairs and maintenance as well as travel and training are largely continued. We support the library’s proposed restoration of the \$500,000 reduction to the book budget because we feel that maintaining a robust collection is critical to the library’s ongoing ability to meet community needs. Once again, the library is obligated to use dollars from its carryover balance in order to balance revenues against ongoing expenditures and to meet the 4% General Fund constraint. The amount for the coming year is \$3.3 million.

EMERGING ISSUES AND CONCLUSION

The LAB believes that strong and stable institutions like the library are a key to the sustained success of the County and its citizens. We understand the revenue difficulties that the County has had to address over the last several years. However, we are very concerned about the ongoing reductions in the County’s General Fund transfer to the library (4% reduction during FY 2008-2009, 12% for FY 2009-2010, and another 4% for FY 2010-2011) because it impedes the long-term stewardship of the institution.

When the current levy rate was set as part of the financial planning for the 2006 levy election, the members of the Levy Committee worked hard to establish an understanding with the then-Board of County Commissioners regarding the level of General Fund support. The Levy Committee accepted the notion of a reduction in the General Fund at that time with the expectation that the planned level of General Fund support would be maintained throughout the life of the levy. Based on that understanding, the 2006 levy rate was increased 13.5 cents, with 9 cents of that increase directly attributable to the loss of General Fund revenue.

Here's where we now stand with the General Fund transfers against the 2006 levy financial plan:

	FY 07-08	FY 08-09	FY 09-10	FY 10-11	FY 11-12
GF Revenue - levy plan	15,891,216	16,367,952	16,858,991	17,364,761	17,885,704
GF Received	15,816,803	15,635,772	13,927,775	14,293,244	
Deficit	(74,413)	(732,180)	(2,931,216)	(3,071,517)	

This is a total projected loss of over \$6.8 million.

These General Fund reductions will have a dramatic and negative effect on the rate of a new levy and, therefore, its potential success. The library's ability to continue to maintain the services promised in the current levy depends on the viability of the financial plan that was agreed on in 2006. The ability of the library's stakeholders to plan for and help pass a new levy depends significantly on the trust that can be counted on during the levy planning process. The planning for a new levy will begin soon.

It is our respectful recommendation that the County make General Fund provision for the library as initially planned during the 2006 levy planning process or support efforts to move the library to a more stable funding model for the future.

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