

ANNOTATED MINUTES

Tuesday, April 25, 1995 - 9:30 AM
Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

CHAIR'S BUDGET PRESENTATION

- B-1 Chair Beverly Stein Will Present the Chair's Proposed 1995-96 Multnomah County Budget to the Budget Committee. This is a Public Meeting and Citizens May Appear and Testify on the Budget.

CHAIR BEVERLY STEIN BUDGET PRESENTATION.

Tuesday, April 25, 1995 - 1:30 PM
Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

PLANNING ITEMS

Chair Beverly Stein convened the meeting at 1:32 p.m., with Vice-Chair Sharron Kelley, Commissioners Gary Hansen, Tanya Collier and Dan Saltzman present.

- P-1 **NSA 1-95** Review the March 23, 1995 Hearings Officer Decision **APPROVING**, Subject to Conditions, a Request for Columbia River Gorge National Scenic Area Site Review to Remove an Existing Residence and Accessory Buildings and to Construct Ball Fields, a Sewage Drain Field, and a Graveled Parking Area in Conjunction with the Existing Corbett Elementary, Middle and High School Complex, for Property Located at 35600 E HISTORIC COLUMBIA RIVER HIGHWAY

DECISION READ, NO APPEAL FILED, DECISION STANDS.

- P-2 **SEC 8-94** Review the April 3, 1995 Hearings Officer Decision **AFFIRMING, AND MODIFYING** the Planning Director Decision and **DENYING** an Appeal in the Matter of **APPROVING**, Subject to Conditions, a Requested Significant Environmental Concern (SEC) Permit for an Addition to an Existing Single Family Dwelling, for Property Located at 5830 NW CORNELL ROAD

DECISION READ, APPEAL FILED. UPON MOTION OF COMMISSIONER KELLEY, SECONDED BY COMMISSIONER SALTZMAN, IT WAS UNANIMOUSLY APPROVED THAT A DE NOVO HEARING BE SCHEDULED FOR 1:30 PM, TUESDAY,

**MAY 23, 1995, WITH TESTIMONY LIMITED TO
MINUTES PER SIDE.**

- P-3 Request for Approval of FINAL ORDER MC 1-94/LD 13-94 Findings in Support of Decision to Uphold the Decisions of the Hearings Officer and Transportation Division Staff and Approve a Land Partition, Access by Easement and Variance to the Street Standards Code, for Property Located at 01400 SW MILITARY ROAD

FOLLOWING DISCUSSION AND AT THE REQUEST OF CHAIR STEIN AND UPON MOTION OF COMMISSIONER COLLIER, SECONDED BY COMMISSIONER HANSEN, IT WAS UNANIMOUSLY APPROVED THAT P-3 BE CONTINUED TO THURSDAY, MAY 4, 1995, IN ORDER TO ALLOW COUNTY COUNSEL TIME TO PREPARE AND SUBMIT A WRITTEN OPINION IN RESPONSE TO THE CONCERNS OF LEGAL COUNSEL FOR THE PARTIES.

- P-4 **CU 2-95/**
HV 2-95 DE NOVO HEARING With Testimony Limited to 20 Minutes Per Side, Including Rebuttal, in the Matter of the March 3, 1995 Hearings Officer Decision DENYING Conditional Use Approval for a Single Family Dwelling Not Related to Forest Management and Variances to Two Side Yard Setback Requirements on a 16.43 Acre Existing Parcel in the Commercial Forest Use Zoning District, for Property Located at 16200 NW McNAMEE ROAD

PLANNER GARY CLIFFORD PRESENTED STAFF REPORT AND EXHIBITED SLIDES OF THE SUBJECT PROPERTY. HEARINGS OFFICER BARRY ADAMSON PRESENTATION AND SUBMITTAL OF APPLICABLE STATUTES USED IN ARRIVING AT HIS DECISION. APPELLANT ATTORNEY FRANK HAMMOND TESTIMONY IN SUPPORT OF REVERSAL OF HEARINGS OFFICER DECISION. CLIFFORD HAMBY TESTIMONY IN SUPPORT OF HEARINGS OFFICER DECISION. COUNTY COUNSEL JOHN DuBAY AND MR. ADAMSON EXPLANATION AND RESPONSE TO BOARD QUESTIONS AND DISCUSSION. COMMISSIONER KELLEY MOVED AND COMMISSIONER HANSEN SECONDED, TO REVERSE THE HEARINGS OFFICER DECISION AND APPROVE THE CONDITIONAL USE APPROVAL. BOARD COMMENTS. REVERSAL APPROVED, WITH COMMISSIONERS KELLEY, HANSEN, COLLIER AND

STEIN VOTING AYE, AND COMMISSIONER SALTZMAN VOTING NO. AT THE SUGGESTION OF MR. DuBAY, CHAIR STEIN DIRECTED PLANNING STAFF TO PREPARE FINDINGS AND SUBMIT FINAL ORDER FOR BOARD APPROVAL.

There being no further business, the planning meeting was adjourned at 2:30 p.m. and the briefing convened at 2:40 p.m.

Tuesday, April 25, 1995
(IMMEDIATELY FOLLOWING PLANNING ITEMS)

**Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland**

BOARD BRIEFING

- B-2 Oregon Health Plan and Managed Care Developments, Specifically Discussion of Issues Related to Oregon Health Plan Alcohol and Drug Services Implementation Scheduled for May 1, 1995 and Progress of Children's Capitation Planning Efforts. Presented by Lorenzo Poe, Howard Klink, Judy Robison, Norma Jaeger, James Edmondson, Tom Fronk and Karen Maki.**

**LOLENZO POE, KAREN MAKI, HOWARD KLINK,
NORMA JAEGER, BILL THOMAS, JAMES
EDMONDSON AND JUDY ROBISON PRESENTATION
AND RESPONSE TO BOARD QUESTIONS AND
DISCUSSION.**

There being no further business, the meeting was adjourned at 3:15 p.m.

**OFFICE OF THE BOARD CLERK
for MULTNOMAH COUNTY, OREGON**



Deborah L. Bogstad

**Thursday, April 27, 1995 - 9:30 AM
Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland**

REGULAR MEETING

Chair Beverly Stein convened the meeting at 9:34 a.m., with Vice-Chair Sharron Kelley, Commissioners Gary Hansen, Tanya Collier and Dan Saltzman present.

BOARD AND COUNSEL GUESTS TRACI AVALOS, LYNDSEY PIMENTEL, ADRIANNE SALTZMAN AND JENNY KRESSEL INTRODUCED THEMSELVES. BOARD ACKNOWLEDGED AUDIENCE GUESTS PARTICIPATING IN "BRING YOUR DAUGHTERS TO WORK" DAY.

CONSENT CALENDAR

UPON MOTION OF COMMISSIONER KELLEY, SECONDED BY COMMISSIONER HANSEN, THE CONSENT CALENDAR (ITEMS C-1 THROUGH C-12) WAS UNANIMOUSLY APPROVED.

NON-DEPARTMENTAL

- C-1 In the Matter of the Reappointment of Rich Goheen to Serve as the City of Fairview Representative on the MULTNOMAH COUNTY ANIMAL CONTROL ADVISORY COMMITTEE, for a Term Ending March 30, 1997
- C-2 RESOLUTION in the Matter of Establishing a Three Year Term for the Multnomah County Appointment to the MT. HOOD CABLE REGULATORY COMMISSION

RESOLUTION 95-84.

SHERIFF'S OFFICE

- C-3 Ratification of Intergovernmental Agreement Contract 800026 Between Metro and Multnomah County, Wherein the Sheriff's Office Will Provide a Supervised Inmate Work Crew to Perform General Labor Such as Ground Maintenance, Yard and Nursery Work, Light Carpentry and Painting at Sites Owned, Operated or Managed by Metro, for the Period April 1, 1995 through June 30, 1996

AGING SERVICES DIVISION

- C-4 Ratification of Intergovernmental Agreement Contract 104385 Between Washington County and Multnomah County, for Administration of the Korean American Senior Citizens Association Meal Site Contract, Providing Meals and Rides to Korean Elders Living in Multnomah County, for the Period July 1, 1994 through December 31, 1995

DEPARTMENT OF ENVIRONMENTAL SERVICES

- C-5 ORDER in the Matter of the Execution of Deed D951175 Upon Complete Performance of a Contract to R. C. Industries, Inc.

ORDER 95-85.

- C-6 ORDER in the Matter of the Execution of Deed D951179 Upon Complete Performance of a Contract to William Scott Burlando, Personal Representative of the Estate of William F. Burlando, Deceased

ORDER 95-86.

- C-7 ORDER in the Matter of the Execution of Deed D951182 for Repurchase of Tax Acquired Property to Former Owners Leroy Fleming, Sr. and Ethel V. Fleming

ORDER 95-87.

- C-8 ORDER in the Matter of the Execution of Deed D951183 Upon Complete Performance of a Contract to Kevin L. Mullen

ORDER 95-88.

- C-9 ORDER in the Matter of the Execution of Deed D951184 Upon Complete Performance of a Contract to Frank S. Rytel

ORDER 95-89.

COMMUNITY AND FAMILY SERVICES DIVISION

- C-10 RESOLUTION in the Matter of Authorizing Designees of the Mental Health Program Director to Direct a Peace Officer to Take an Allegedly Mentally Ill Person into Custody

RESOLUTION 95-90.

- C-11 Budget Modification CFSD 9 Requesting Authorization to Increase the Alcohol and Drug Community Awareness and Prevention Budget by \$45,762 to Reflect Renewal of the Regional Drug Initiative Contract
- C-12 Ratification of Intergovernmental Agreement Contract 101665 Between Multnomah County and the State Board of Higher Education, Oregon Health Sciences University, University Hospital, Providing Emergency Psychiatric Hold Beds at Set Rates for Involuntary Commitment Placement Clients of Multnomah County, for the Period July 1, 1994 through June 30, 1995

REGULAR AGENDA

PUBLIC COMMENT

- R-1 Opportunity for Public Comment on Non-Agenda Matters. Testimony Limited

to Three Minutes Per Person.

NO ONE WISHED TO COMMENT.

MANAGEMENT SUPPORT SERVICES

- R-2 Presentation in the Matter of Employee Service Awards Honoring Multnomah County Employees with Five to Twenty-Five Years of Service

BOARD GREETED, ACKNOWLEDGED AND PRESENTED 5 YEAR AWARDS TO SANDRA KIRKLAND OF ASD, ELIZABETH TERRELL OF CFS, SUSAN HOWE OF DA, SCOTT RAYFIELD OF DCC, MOLLIE BALLEW, KENNETH COLLMER, LANCE DUNCAN, PAUL HEINE AND DIANE ILG OF DES, BEVERLY COOK AND JOHN MILLER OF JJD, WESLEY STEVENS AND CONNIE THELIN OF DLS, AND GERALD ITKIN AND CARL STEWARD OF NOND; 10 YEAR AWARDS TO BUNNY HARROLD OF CFS, ALFREDO RANGEL OF DCC, BRIAN FOWLES OF DES, LAVORIS JACKSON OF JJD AND DONNA THOMPSON OF DLS; 15 YEAR AWARDS TO PRISCILLA MURRAY OF CFS, LISA MOORE OF DA, LAWRENCE MONAGON OF DCC, LAUREN ARMSTRACHAN, TERRY RUDD AND DUANE SPERL OF DES AND KATHERINE CHARTIER OF DLS; 20 YEAR AWARDS TO SAUNDRA WEDGE OF DCC AND EUNICE BUTLER OF DES; AND 25 YEAR AWARDS TO JOAN VIELHAUER OF DES. CURTIS SMITH ANNOUNCED NEXT PRESENTATION WILL BE JULY 20, 1995.

DEPARTMENT OF ENVIRONMENTAL SERVICES

- R-3 PUBLIC HEARING and Consideration of an ORDER in the Matter of Approving Request for Transfer of Tax Foreclosed Property to City of Portland for Low Income Housing Development

COMMISSIONER SALTZMAN MOVED AND COMMISSIONER COLLIER SECONDED, APPROVAL OF R-3. RICHARD PAYNE EXPLANATION. GRETCHEN DURSCH FROM HOUSING OUR FAMILIES AND GREG CARLSON FROM CITY OF PORTLAND TESTIMONY IN SUPPORT. ORDER 95-91 UNANIMOUSLY APPROVED.

- R-4 ORDER Setting May 11, 1995 as a Hearing Date in the Matter of Approving

Requests for Transfers of Tax Foreclosed Properties to Portland Public
Schools for Public Uses

**COMMISSIONER COLLIER MOVED AND
COMMISSIONER SALTZMAN SECONDED,
APPROVAL OF R-4. MR. PAYNE EXPLANATION
AND RESPONSE TO BOARD QUESTION. ORDER 95-
92 UNANIMOUSLY APPROVED.**

DEPARTMENT OF COMMUNITY CORRECTIONS

**R-5 Ratification of the 1993-1995 Community Corrections Plan Amendment
Contract 900374 Between the State of Oregon Department of Corrections and
Multnomah County, Reflecting Various Changes in Program Funding**

**COMMISSIONER KELLEY MOVED AND
COMMISSIONER HANSEN SECONDED, APPROVAL
OF R-5. SUSAN KAESER AND CARY HARKAWAY
EXPLANATION AND RESPONSE TO BOARD
QUESTIONS AND DISCUSSION REGARDING ITEMS
R-5 AND R-6. COMMISSIONER SALTZMAN MOVED
AND COMMISSIONER COLLIER SECONDED, TO
RETAIN \$20,000 OF THE \$247,000 BUDGETED IN
INTENSIVE CASE MANAGEMENT, TO BE USED IN
THE FINAL TWO MONTHS OF THIS FISCAL YEAR
TO PROVIDE A SALARY INCENTIVE TO GET AN
EXISTING PAROLE OFFICER TO GO INTO
INTENSIVE SUPERVISION AND MONITOR
PREDATORY SEX OFFENDERS, OR TO USE THE
\$20,000 FOR A TARGETED RECRUITMENT
CAMPAIGN FOR THIS POSITION. MS. KAESER
EXPLANATION IN RESPONSE TO BOARD
QUESTIONS AND DISCUSSION. COMMISSIONERS
SALTZMAN AND COLLIER WITHDREW THEIR
MOTION AND SECOND. COMMISSIONER COLLIER
MOVED AND COMMISSIONER SALTZMAN
SECONDED, THAT A PLAN REGARDING STAFFING
OF THE INTENSIVE CASE MANAGEMENT UNIT BE
DEVELOPED IN WRITING BY MAY 15, 1995. MR.
HARKAWAY EXPLANATION IN RESPONSE TO
BOARD QUESTIONS AND DISCUSSION.
AMENDMENT UNANIMOUSLY APPROVED. BOARD
COMMENTS. AGREEMENT APPROVED, WITH
COMMISSIONERS HANSEN, KELLEY, SALTZMAN
AND STEIN VOTING AYE, AND COMMISSIONER
COLLIER VOTING NO.**

- R-6 **Budget Modification DCC 5 Requesting Authorization to Increase the Department's Management Information Systems Budget from Personnel Cost Savings and Unfilled Sanction Violation Beds, to Add 3 Positions, Materials and Services and Equipment for System Development and Support within the Department**

UPON MOTION OF COMMISSIONER KELLEY, SECONDED BY COMMISSIONER HANSEN, BUDGET MODIFICATION IS APPROVED, WITH COMMISSIONERS HANSEN, KELLEY, SALTZMAN AND STEIN VOTING AYE, AND COMMISSIONER COLLIER VOTING NO.

NON-DEPARTMENTAL

- R-7 **RESOLUTION in the Matter of Approving the Chair's Proposed 1995-96 Budget for Submittal to the Tax Supervising and Conservation Commission as Required by Law**
- R-10 **RESOLUTION in the Matter of Constructing 32 Additional Beds at the Multnomah County Juvenile Justice Complex and Exploring the Feasibility of Constructing a Triage Center on that Site**
- R-11 **RESOLUTION in the Matter of Constructing Additional Beds for the Multnomah County Juvenile Justice Complex and Examining the Feasibility of Using a Portion of that Facility for a Mental Health Crisis Triage Center**

AT THE REQUEST OF CHAIR STEIN AND UPON MOTION OF COMMISSIONER KELLEY, SECONDED BY COMMISSIONER HANSEN, ITEMS R-7, R-10 AND R-11 WERE UNANIMOUSLY CONTINUED TO THURSDAY, MAY 4, 1995.

- R-8 **RESOLUTION in the Matter of Endorsing and Siting the Gladys McCoy Citizen Participation Award**

COMMISSIONER COLLIER MOVED AND COMMISSIONER KELLEY SECONDED, APPROVAL OF R-8. JOHN LEGRY AND DERRY JACKSON PRESENTATION AND COMMENTS. CHAIR STEIN ACKNOWLEDGED BILL GORDON AS FIRST RECIPIENT OF AWARD. RESOLUTION 95-93 UNANIMOUSLY APPROVED.

- R-9 **Presentation and Request for Approval of the Proposed 1995-96 Mt. Hood Cable Regulatory Commission Budget**

**COMMISSIONER COLLIER MOVED AND
COMMISSIONER KELLEY SECONDED, APPROVAL
OF R-9. JACK ADAMS AND BLYTHE OLSON
TESTIMONY IN SUPPORT OF BUDGET. DAVID
OLSON EXPLANATION AND RESPONSE TO BOARD
QUESTIONS. COMMISSIONER SALTZMAN
REQUESTED A BRIEFING TO DISCUSS CABLE FOR
INMATES. JIM WHITTENBURG TESTIMONY.
BUDGET UNANIMOUSLY APPROVED.**

The regular meeting was adjourned at 10:58 a.m., and the briefing convened
at 11:03 a.m.

Thursday, April 27, 1995
IMMEDIATELY FOLLOWING REGULAR MEETING
Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

BOARD BRIEFING

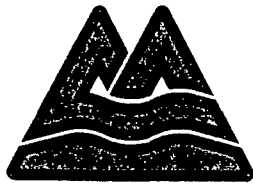
B-3 Presentation of the Results of the Multnomah County Animal Control Budget
Study. Presented by David Flagler, Heidi Soderberg and Keri Hardwick.

**HEIDI SODERBERG, DAUGHTER LYNDSEY
PIMENTEL, DAVE FLAGLER AND DAUGHTER
STACY FLAGLER PRESENTATION. MR. FLAGLER,
KERI HARDWICK AND MS. SODERBERG RESPONSE
TO BOARD QUESTIONS AND DISCUSSION.**

There being no further business, the meeting was adjourned at 11:30 a.m.

OFFICE OF THE BOARD CLERK
for MULTNOMAH COUNTY, OREGON


Deborah L. Bogstad



MULTNOMAH COUNTY OREGON

OFFICE OF THE BOARD CLERK
SUITE 1510, PORTLAND BUILDING
1120 S.W. FIFTH AVENUE
PORTLAND, OREGON 97204

BOARD OF COUNTY COMMISSIONERS		
BEVERLY STEIN •	CHAIR	• 248-3308
DAN SALTZMAN •	DISTRICT 1	• 248-5220
GARY HANSEN •	DISTRICT 2	• 248-5219
TANYA COLLIER •	DISTRICT 3	• 248-5217
SHARRON KELLEY •	DISTRICT 4	• 248-5213
CLERK'S OFFICE •	248-3277	• 248-5222

AGENDA

MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS

FOR THE WEEK OF

APRIL 24, 1995 - APRIL 28, 1995

Tuesday, April 25, 1995 - 9:30 AM - Chair's Budget Page 2

Tuesday, April 25, 1995 - 1:30 PM - Planning Items Page 2

Tuesday, April 25, 1995 - Board Briefing Page 3
(IMMEDIATELY FOLLOWING PLANNING ITEMS)

Thursday, April 27, 1995 - 9:30 AM - Regular Meeting Page 3

Thursday, April 27, 1995 - Board Briefing Page 6
(IMMEDIATELY FOLLOWING REGULAR MEETING)

*Thursday Meetings of the Multnomah County Board of Commissioners are
taped and can be seen by Paragon Cable subscribers at the following times:*

Thursday, 6:00 PM, Channel 30

Friday, 10:00 PM, Channel 30

Saturday, 12:30 PM, Channel 30

Sunday, 1:00 PM, Channel 30

**INDIVIDUALS WITH DISABILITIES MAY CALL THE OFFICE OF THE BOARD
CLERK AT 248-3277 OR 248-5222, OR MULTNOMAH COUNTY TDD PHONE 248-
5040, FOR INFORMATION ON AVAILABLE SERVICES AND ACCESSIBILITY.**

Tuesday, April 25, 1995 - 9:30 AM

Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

CHAIR'S BUDGET PRESENTATION

- B-1 Chair Beverly Stein Will Present the Chair's Proposed 1995-96 Multnomah County Budget to the Budget Committee. This is a Public Meeting and Citizens May Appear and Testify on the Budget.
-

Tuesday, April 25, 1995 - 1:30 PM

Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

PLANNING ITEMS

- P-1 NSA 1-95 Review the March 23, 1995 Hearings Officer Decision APPROVING, Subject to Conditions, a Request for Columbia River Gorge National Scenic Area Site Review to Remove an Existing Residence and Accessory Buildings and to Construct Ball Fields, a Sewage Drain Field, and a Graveled Parking Area in Conjunction with the Existing Corbett Elementary, Middle and High School Complex, for Property Located at 35600 E HISTORIC COLUMBIA RIVER HIGHWAY
- P-2 SEC 8-94 Review the April 3, 1995 Hearings Officer Decision AFFIRMING, AND MODIFYING the Planning Director Decision and DENYING an Appeal in the Matter of APPROVING, Subject to Conditions, a Requested Significant Environmental Concern (SEC) Permit for an Addition to an Existing Single Family Dwelling, for Property Located at 5830 NW CORNELL ROAD
- P-3 Request for Approval of FINAL ORDER MC 1-94/LD 13-94 Findings in Support of Decision to Uphold the Decisions of the Hearings Officer and Transportation Division Staff and Approve a Land Partition, Access by Easement and Variance to the Street Standards Code, for Property Located at 01400 SW MILITARY ROAD
- P-4 CU 2-95/
HV 2-95 DE NOVO HEARING With Testimony Limited to 20 Minutes Per Side, Including Rebuttal, in the Matter of the March 3, 1995 Hearings Officer Decision DENYING Conditional Use Approval for a Single Family Dwelling Not Related to Forest Management and Variances to Two Side Yard Setback Requirements on a 16.43 Acre Existing Parcel in the Commercial Forest Use Zoning District, for Property Located at 16200 NW McNAMEE ROAD

Tuesday, April 25, 1995

(IMMEDIATELY FOLLOWING PLANNING ITEMS)

Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

BOARD BRIEFING

- B-2 *Oregon Health Plan and Managed Care Developments, Specifically Discussion of Issues Related to Oregon Health Plan Alcohol and Drug Services Implementation Scheduled for May 1, 1995 and Progress of Children's Capitation Planning Efforts. Presented by Lorenzo Poe, Howard Klink, Judy Robison, Norma Jaeger, James Edmondson, Tom Fronk and Karen Maki. 1 HOUR REQUESTED.*
-

Thursday, April 27, 1995 - 9:30 AM

Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland

REGULAR MEETING

CONSENT CALENDAR

NON-DEPARTMENTAL

- C-1 *In the Matter of the Reappointment of Rich Goheen to Serve as the City of Fairview Representative on the MULTNOMAH COUNTY ANIMAL CONTROL ADVISORY COMMITTEE, for a Term Ending March 30, 1997*
- C-2 *RESOLUTION in the Matter of Establishing a Three Year Term for the Multnomah County Appointment to the MT. HOOD CABLE REGULATORY COMMISSION*

SHERIFF'S OFFICE

- C-3 *Ratification of Intergovernmental Agreement Contract 800026 Between Metro and Multnomah County, Wherein the Sheriff's Office Will Provide a Supervised Inmate Work Crew to Perform General Labor Such as Ground Maintenance, Yard and Nursery Work, Light Carpentry and Painting at Sites Owned, Operated or Managed by Metro, for the Period April 1, 1995 through June 30, 1996*

AGING SERVICES DIVISION

- C-4 *Ratification of Intergovernmental Agreement Contract 104385 Between Washington County and Multnomah County, for Administration of the Korean*

American Senior Citizens Association Meal Site Contract, Providing Meals and Rides to Korean Elders Living in Multnomah County, for the Period July 1, 1994 through December 31, 1995

DEPARTMENT OF ENVIRONMENTAL SERVICES

- C-5 *ORDER in the Matter of the Execution of Deed D951175 Upon Complete Performance of a Contract to R. C. Industries, Inc.*
- C-6 *ORDER in the Matter of the Execution of Deed D951179 Upon Complete Performance of a Contract to William Scott Burlando, Personal Representative of the Estate of William F. Burlando, Deceased*
- C-7 *ORDER in the Matter of the Execution of Deed D951182 for Repurchase of Tax Acquired Property to Former Owners Leroy Fleming, Sr. and Ethel V. Fleming*
- C-8 *ORDER in the Matter of the Execution of Deed D951183 Upon Complete Performance of a Contract to Kevin L. Mullen*
- C-9 *ORDER in the Matter of the Execution of Deed D951184 Upon Complete Performance of a Contract to Frank S. Rytel*

COMMUNITY AND FAMILY SERVICES DIVISION

- C-10 *RESOLUTION in the Matter of Authorizing Designees of the Mental Health Program Director to Direct a Peace Officer to Take an Allegedly Mentally Ill Person into Custody*
- C-11 *Budget Modification CFSD 9 Requesting Authorization to Increase the Alcohol and Drug Community Awareness and Prevention Budget by \$45,762 to Reflect Renewal of the Regional Drug Initiative Contract*
- C-12 *Ratification of Intergovernmental Agreement Contract 101665 Between Multnomah County and the State Board of Higher Education, Oregon Health Sciences University, University Hospital, Providing Emergency Psychiatric Hold Beds at Set Rates for Involuntary Commitment Placement Clients of Multnomah County, for the Period July 1, 1994 through June 30, 1995*

REGULAR AGENDA

PUBLIC COMMENT

- R-1 *Opportunity for Public Comment on Non-Agenda Matters. Testimony Limited to Three Minutes Per Person.*

MANAGEMENT SUPPORT SERVICES

- R-2 *Presentation in the Matter of Employee Service Awards Honoring Multnomah County Employees with Five to Twenty-Five Years of Service*

DEPARTMENT OF ENVIRONMENTAL SERVICES

- R-3 *PUBLIC HEARING and Consideration of an ORDER in the Matter of Approving Request for Transfer of Tax Foreclosed Property to City of Portland for Low Income Housing Development*
- R-4 *ORDER Setting May 11, 1995 as a Hearing Date in the Matter of Approving Requests for Transfers of Tax Foreclosed Properties to Portland Public Schools for Public Uses*

DEPARTMENT OF COMMUNITY CORRECTIONS

- R-5 *Ratification of the 1993-1995 Community Corrections Plan Amendment Contract 900374 Between the State of Oregon Department of Corrections and Multnomah County, Reflecting Various Changes in Program Funding*
- R-6 *Budget Modification DCC 5 Requesting Authorization to Increase the Department's Management Information Systems Budget from Personnel Cost Savings and Unfilled Sanction Violation Beds, to Add 3 Positions, Materials and Services and Equipment for System Development and Support within the Department*

NON-DEPARTMENTAL

- R-7 *RESOLUTION in the Matter of Approving the Chair's Proposed 1995-96 Budget for Submittal to the Tax Supervising and Conservation Commission as Required by Law*
- R-8 *RESOLUTION in the Matter of Endorsing and Siting the Gladys McCoy Citizen Participation Award*
- R-9 *Presentation and Request for Approval of the Proposed 1995-96 Mt. Hood Cable Regulatory Commission Budget*
- R-10 *RESOLUTION in the Matter of Constructing 32 Additional Beds at the Multnomah County Juvenile Justice Complex and Exploring the Feasibility of Constructing a Triage Center on that Site*
- R-11 *RESOLUTION in the Matter of Constructing Additional Beds for the Multnomah County Juvenile Justice Complex and Examining the Feasibility of Using a Portion of that Facility for a Mental Health Crisis Triage Center*

Thursday, April 27, 1995

IMMEDIATELY FOLLOWING REGULAR MEETING

*Multnomah County Courthouse, Room 602
1021 SW Fourth, Portland*

BOARD BRIEFING

B-3 Presentation of the Results of the Multnomah County Animal Control Budget Study. Presented by David Flagler, Heidi Soderberg and Keri Hardwick. 30 MINUTES REQUESTED.

MEETING DATE: April 25, 1995

AGENDA NO: B-1

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: Chair Stein's Budget Message and Proposed 1995-96 Multnomah County Budget

BOARD BRIEFING Date Requested: Tuesday, April 25, 1995

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: _____

Amount of Time Needed: _____

DEPARTMENT: Non-Departmental DIVISION: Chair Beverly Stein

CONTACT: Bill Farver TELEPHONE #: 248-3958
BLDG/ROOM #: 106/1515

PERSON(S) MAKING PRESENTATION: Chair Beverly Stein

ACTION REQUESTED:

☒ INFORMATIONAL ONLY ☐ POLICY DIRECTION ☐ APPROVAL ☐ OTHER

SUMMARY (Statement of rationale for action requested, personnel and fiscal/budgetary impacts, if applicable):

Chair Beverly Stein Will Present Her Budget Message and the Chair's Proposed 1995-96 Multnomah County Budget to the Budget Committee. This is a Public Meeting and Citizens May Appear and Testify on the Budget.

1995 APR 17 AM 10:47
MULTNOMAH COUNTY
OREGON

SIGNATURES REQUIRED:

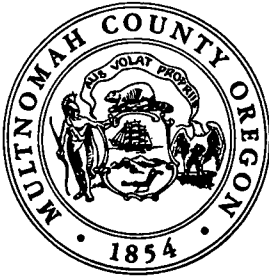
ELECTED OFFICIAL: Beverly Stein

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

Any Questions: Call the Office of the Board Clerk 248-3277/248-5222



Beverly Stein, Multnomah County Chair

Room 1515, Portland Building
1120 S.W. Fifth Avenue
Portland, Oregon 97204

Phone: (503) 248-3308
FAX: (503) 248-3093
E-Mail: MultChair@aol.com

CHAIR'S EXECUTIVE BUDGET MESSAGE

Tuesday April 25, 1995

I am pleased to offer you my 1995-96 executive budget. The budget has been constructed mindful of the county's urgent benchmarks for public safety, children and families, access to services and good government. The budget balances pressing needs with fiscal constraints by emphasizing efficient, careful use of resources and stretching tax dollars by leveraging our investments with non-county private and public dollars.

The public deserves, and the county is committed to, a customer-oriented, outcome driven, quality focused, highly productive government. This budget provides incentives and tools to accelerate our movement in that direction.

To maximize our resources, I have continued the emphasis on inter-departmental collaborations within Multnomah County, and county partnerships with other governments, education, business, and the community. These partnerships are the only way we can reach the scale of effort needed to respond to our challenges.

In the county, we are responsible for addressing complex societal problems. There are no simple solutions or silver bullet programs which will change that reality. Our challenge, using this budget as a tool, is to think systemically, use data and best practices to the extent available, and continue to hold out the vision of a healthy, liveable community.

To the extent resources were available you will find emphases in this year's budget on the following:

- * increasing resources to reduce juvenile crime and meet the public's mandate for more punishment;
- * working with the Sheriff and the Community Corrections Director to maximize public safety by increasing the capacity and efficiency of our jails and community corrections system;
- * preserving the public's investment in our county facilities and adding value to our work force investments;
- * upgrading and enhancing our information systems;
- * investing in programs for children and families.



I very much appreciate the work of the Citizen Budget Advisory Committees which provide citizen input into our budget process. I am pleased to report that in large part my budget tracks the recommendations and emphases recommended by the Central CBAC.

Highlights of Resources Available and Expenditures

I am proposing a budget for Multnomah County that will expend \$559.7 million. This represents a decrease from the prior year of just under 0.9%. The net decrease is primarily a result of reduced construction spending at the Juvenile Detention Home and the Central Library and more realistic budgeting in the CareOregon Fund where our experience of a year's worth of operation enables us to lower the budgeted amounts.

General Fund expenditures are proposed at \$172.6 million, an increase of 4.9%. State/Federal Fund expenditures are proposed at \$182.9 million, an increase of 2.9%. Total property tax collections are projected at \$132.45 million, an 11.9% increase over last year, due to rising property values and new construction. Business Income Tax receipts are projected at \$27.4 million, an increase of 2.3% over last year's budget.

I have allocated an additional \$1.5 million in this budget toward the goal to build a General Fund reserve of 5% of budget expenditures. This will bring our reserve to a total of \$4.6 million. Our policy goal is \$8.6 million.

By necessity, this budget was constructed in an environment of uncertainty. We know there will be an impact on the county from state budget cuts and changes in state relationships with local government, but we don't know the full extent of state actions at this time. The long and short range implications of federal funding and policy changes are also not known.

While the specific details of the state proposals to shift the responsibilities for felony offenders sentenced to less than 12 months are still being discussed at the capitol, we have utilized some of what we anticipate will be at least \$7.4 million in new state funding (based on the current per bed/per day rates being discussed). I have included \$825,000 from this amount to continue funding for beds and sanctions for parole violators at the Multnomah County Restitution Center.

Increasing Resources to Respond to Juvenile Crime

The increase of juvenile violent crime is a major public safety concern, an urgent county benchmark, and the county is responding. This is the only area in which major increases in funding and new programs are recommended in this budget. Approximately \$1.75 million in General Fund is added to the Juvenile Justice Division budget.

Using the best data available, we have projected the future impact of Ballot Measure 11, the availability of secure detention at the state level (McLaren), and the effect of our Detention Reform initiative, in order to identify our needs for detention space and community programs. Investments are needed in every category. We have tried to strike a balance which recognizes the importance of public safety, prevention, early intervention, accountability and efficient use of resources.

This budget includes funding to expand our detention center by 32 beds and money for additional community programs. The investments in our juvenile system in this budget build on the programs started last year and continue our goal of creating a true continuum of services and accountability. Last year the Board funded a new diversion program with increased accountability for failure to participate. As a result, attendance at mandated diversion programs has increased from 40% to 74% with the added benefit of increased parental involvement.

Improving Public Safety

I have worked closely with the Sheriff and the Community Corrections Director to maximize public safety by increasing the capacity and efficiency of our jails and community corrections programs. Sheriff Bunnell and I have agreed on this budget submission. The objectives of our agreement are:

- * to assure that all released offenders (pre-trial and sentenced), including matrixed offenders, who need supervision to protect the community and to assure appearance at trial, will get that supervision;
- * to use the Sheriff's work force and facilities in the most cost effective and proactive ways possible;
- * to use the community policing experience of the Sheriff's Office and the Department of Community Corrections to enhance our ability to deal with troubled families and juvenile crime.

To accomplish these objectives we have agreed that the budget will include funding for the Sheriff to temporarily add 45 inmates at the Inverness Jail, to expand the use of video technology for arraignments, and to open a temporary booking site in Gresham.

The Sheriff has also agreed to consolidate enforcement records and corrections records functions to save money and use resources more efficiently.

The Sheriff is working with the Community Corrections Director to coordinate the pre-trial release system in order to conserve tax dollars by eliminating duplication and to assure we are supervising offenders appropriately to protect public safety.

The Department of Community Corrections budget absorbs a \$2 million cut in state funds and faces much uncertainty due to proposals in the state legislature. However, this budget is built on the premise that we are still committed to a continuum of services and sanctions aimed at reducing recidivism. The STOP program has proved to be a successful way of diverting offenders with drug and alcohol problems. Since the federal grant which supported this program is ending, we have funded it in this budget because of its success and broad support in the justice community.

We need a public safety system which is integrated, coordinated, and which uses tax dollars wisely. This requires a high degree of trust and collaboration among traditionally independent institutions. I believe these budget proposals and related agreements contribute to creating such a system.

Preserving Our Public Investments in County Facilities and Adding Value to Our Workforce Investments

Some 50 county-owned buildings stand as a testament to generations of taxpayer investment in the future. Last year, a comprehensive assessment of our property confirmed our suspicions that we are not maintaining our buildings properly. I have allocated \$2.9 million to maintain, upgrade, and comply with ADA requirements for our buildings in order to protect the public's investment. The next step is for the Board to define a facilities plan and funding mechanisms to implement the plan.

This budget includes funds to open the Midland Library by the end of the fiscal year. We are looking forward to this expansion of our library services in mid-Multnomah County.

County government is a labor intensive business. The quality and productivity of our services depends primarily on the skills of our workers. Employee training is the most direct and cost-effective path to high quality services. The RESULTS Steering Committee and its Design Team are developing a comprehensive plan for the RESULTS initiative. This work will contribute to shaping the training plan for the county. We already know that line employees and managers need training to work in teams, redesign processes, evaluate data, and to take advantage of the richness of a diverse workforce. We also know we need resources for training in conflict resolution, performance evaluation, and new roles for managers.

This budget includes an important investment in training our workforce. I believe it will pay us a return far beyond the dollars we invest in terms of productivity and improved customer service.

Upgrading and Enhancing Information Systems

The county's ability to work effectively and to communicate is dependent on increasing our capacity to gather, analyze, and distribute information. We cannot be an outcome-driven government if we can't get the information we need to evaluate our programs. And all the data in the world is not useful if we don't have the capacity to evaluate and use it. We cannot be customer-focused if we can't communicate easily internally and externally. Therefore, this budget includes funds for information systems, communications and evaluation.

You will find in this budget funds allocated for:

- * hardware, software and personnel investments in Community and Family Services that will begin to create an integrated client database and provide information necessary to do good program evaluation;
- * investments in Environmental Services to implement the information systems strategic plan, to develop automation requirements in Planning, for records imaging equipment in Transportation, a mapping system upgrade, and an imaging/cashiering system at Assessment and Taxation;
- * use of Casey Foundation funds for a document imaging system at Juvenile Justice;
- * funds for additional public computers, an automated scheduling system and grant funding to develop Children's CD-ROM Centers in the Library;
- * funding within the Sheriff's Office for continuing work on the Sheriff's Warrant Inmate System and the development of a scheduling system.

Aging Services and Community Corrections have secured state money for some important investments in technology for their areas.

Investing in Programs for Children and Families

Family support networks are built on the strengths of families and communities. Networks incorporate and combine resources from various sectors and recognize that families are diverse. These networks continue to be the framework for our children and families policy. The Multnomah Commission on Children and Families is playing an important role in advocating for the changes which are required to make such a system a reality.

This budget adds services which are catalysts for systems changes and fills pressing service gaps. Many of these proposals require contributions from other sectors and institutions.

I have incorporated funding to start a crisis triage center to assist the police and others to deal with people with mental illness who are in crisis. Other partners will have to come forward to make this important service a reality.

Funds are allocated for staff to advocate for and coordinate child care services (with the City of Portland and ESD), to improve county services delivered to school children, and to combine our District Coordinating Teams and the Leaders Roundtable Caring Communities. All these functions require matching funds from others. I have also proposed a challenge grant to the business community to augment school and county funds to add alternative school services to meet the needs of our young people.

Few efforts have more benefits than reducing teen pregnancy and child abuse. In this budget, I have funded the Health Department request to expand the Postponing Sexual Involvement program to 15 schools in the county. This program focuses on teaching refusal skills to middle school students. Success in these areas will prevent many future problems. I have added funding for a District Attorney to the Child Abuse Team.

Health services are going through radical transformations as we move to a managed care system. The county Health Department has been a pioneer in this area with CareOregon. Now our Community and Family Services Division is preparing to implement capitated managed care systems for alcohol and drug and childrens' mental health services. Recognizing the potential financial risk to the county, and the degree of innovation required to make these changes, I have incorporated in this budget funds to provide the technical assistance and advice needed to assure we are acting prudently in these managed care endeavors.

Protecting the vulnerable elderly is a very important community and family value. This budget includes enhancements for monitoring and training adult home care providers and for expanding the public guardian program.

Appreciation and Thanks!

I want to thank the department and division heads and their budget analysts, Barry Crook and Dave Warren and the Budget and Quality Office staff, and Bill Farver and Meganne Steele from my staff, for their team work, and professional and cooperative approach to this budgeting process. To make this work, everyone was required to do their part--and they did. Thank you.

Beverly Stein



Beverly Stein, Multnomah County Chair

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MEMORANDUM

TO : Board of County Commissioners
FROM : Beverly Stein
DATE : April 25, 1995
RE : Transmittal of Budget Office Analysis

BOARD OF
COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1995 APR 26 PM 1:12

In our continuing effort to improve the flow on information and enhance our decision making process, I want to provide you with the background information I used during my decision-making on what to include in my budget proposal and what to leave out. I am sending you the analysis memos the Budget Office prepared regarding departmental submittals, including their separate memos on training, state cutbacks, information systems expenditures, vacancy savings and the capital improvements program for facilities. I am also including a copy of the spreadsheet the Budget Office prepared to document my decisions on departmental add packages.

I was generally pleased with the analysis provided and hope you benefit from it also. We haven't had this type of formalized analysis before this budget session. I hope we can learn from it in terms of what is helpful, what is not, and what is missing. As you can see, we had many requests we could not honor and a great deal of uncertainty regarding state funding levels.

These memos began the process of review and deliberation on departmental budget requests. They served to initiate discussion and formed the agenda during the initial budget meetings between the department and the Chair's Office. In some cases, they raised questions that required additional analysis and ideas, and it was this subsequent inquiry that is **not** reflected in this written format. Sometimes, the recommendations in these documents formed the basis for my final budget decisions. Sometimes the subsequent dialogue, and the options developed from that dialogue, created the final decisions. Those, of course, are not documented here, but we will share that thinking with you as we proceed through the process.

Should you have questions, do not hesitate to call on me, Bill Farver, Meganne Steele, Barry Crook, Dave Warren, or the analysts themselves. I think providing this information will increase the level of our discussion.

I look forward to the work we begin together in determining the allocation of resources and the direction for our county government.



PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
Community and Family Svcs						
Original requests						
CFS 1	Centralized MIS	145,000	3.00	145,000	3.00	In conjunction with Mult2 - more support for integrated data bases
CFS 1	Facilities Overhead	46,018		0	0.00	No additional General Fund
CFS 2	Managed behavioral health - planning and admin for all such managed care activities	364,708	7.00	100,000	0.00	Provide for consultant to define probability of success and necessary structure.
CFS 2	Outpatient adult mental health, non Medicaid eligible - restores State cuts	1,079,585		0	0.00	Consider for funding, in part, from the reserve pending other government funding decisions
CFS 2	Children mental health to non-Medicaid eligible - restores State cut	380,504		0	0.00	Consider for funding, in part, from the reserve pending other government funding decisions
CFS 3	Hooper support - fix structural deficit and cover cost increases	138,921		73,782	0.00	No COLA, cover lost gambling addiction revenue and administrative overhead rate increase
CFS 3	Crisis triage - funding for startup and exploration only, looking for site and other funding	2,900,000		400,000		OTO money
CFS 3	Consumer run empowerment - restores state cut - drop in mental health svcs for seriously mentally ill with no other care, particularly homeless	154,093		0	0.00	Consider for funding, in part, from the reserve pending other government funding decisions
CFS 3	DD residential support for selected young people	170,000		0	0.00	
Results of Review with Department						
CFS	DCT/Caring Community			60,000	0.00	Requires match from schools and other institutions
CFS	Alternative Schools			50,000	0.00	Requires match from schools and businesses
CFS	Family Center support			100,000	0.00	Support for expanded County programs at Center sites
CFS	Day Care Coordinator			44,877	1.00	Joint funding with ESd and City of Portland
CFS	School Liaison			40,000	0.00	
TOTAL Community and Family Svcs		5,378,829	10.00	1,013,659	4.00	

PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
Health Department						
Original Requests						
HD 1	Restoration of nurses cut to cover cost of ONA settlement.	496,203	5.90	182,001	3.27	GF Share (\$182k) only. The balance absorbed in Health.
HD 2	Postponing sexual involvement	386,999	4.40	295,920	4.40	
HD 3	Open school based clinics, 1 high school and 2 elementary	433,799	6.40	0	0.00	Consider funding when other revenue sources have been successfully tapped -- schools, ESD, insurance billings, for example. Continue current level only in 95-6
HD 4	Pharmacists in jail	451,473	8.00	0	0.00	
	HD Building Mgmt costs	25,000	0.00	0	0.00	
Results of Review with Department						
	HD Odor enforcement recommended by Comm. Hansen	4,968	0.00	4,968	0.00	
TOTAL Health Department		1,798,442	24.70	482,889	7.67	
Aging Services						
Original requests						
ASD 1	Adult Care home monitoring and followup	101,451	4.00	94,483	3.35	Combination of ASD 1 and 2, Adult Care home monitoring and followup (2 FTE) and Training for Operators (1 FTE)
ASD 2	PDS to develop and monitor training for adult care home operators	47,000	0.85	0	0.00	See ASD 1
ASD 3	Public Guardian expansion from 147 to 190 clients	51,768	2.00	51,768	2.00	
ASD 4	E County focal point office	84,588	0.00	0	0.00	
ASD 5	Multi-ethnic community liaison	69,439	1.50	0	0.00	
ASD 6	Alternate transportation	45,315	0.00	0	0.00	Tri Met responsibility, need to find ways for them to be more efficient
ASD 7	Adult protective services	30,878	1.50	30,878	1.50	Although this is a State responsibility, the danger to elderly residents requires action
ASD 8	COLA for contractors	13,897	0.00	0	0.00	No COLA for contractors.
TOTAL Aging Services		444,336	9.85	177,129	6.85	

PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
Juvenile Justice						
Original requests						
JJD 1	SE Office - restores state cut	103,109	2.50	103,109	2.50	Backfills behind reduced State funding, from cuts within JJD.
JJD 2	Infrastructure - management and support in fiscal, evaluation, counseling supervision, and purchasing	205,056	4.00	175,859	3.00	Revise to add Mgmt Asst for Finance, 0.5 FTE FS2, reclass Counseling Administrator to Counseling Mgr., and 0.5 OA for purchasing.
JJD 3	Parole transition coordinator - restores state cut	14,702	0.25	14,702	0.25	Backfills behind reduced State funding.
Results of Review with Department						
JJD b	Overtime and Temporary	80,000	0.00	50,000	0.00	Partially offsetting historical underbudgeting.
	Juvenile General detention and parole Package transition unit			598,213	17.00	Net cost lower because of payments from Clackamas and Washington Counties for additional detention leases. Gross cost is \$1,061,966
	Community programming			400,000	0.00	Will return in June with recommendations
	Lease payment			184,673	0.00	Net cost without Washington County payment. Gross cost is \$369,346
	AITP			176,702	0.00	Restores funding reduction from lower Medicaid rates. (Actually split between JJD and CFS).
	Ballot Measure 11 pretrial supervision			40,000	1.00	
	Community Planning position			75,828	1.00	Job class to be determined.
JJD c	Delay Sex Offender Unit until February			(556,436)	0.00	OTO savings from delaying startup 7 months..
TOTAL Juvenile Justice		402,867	6.75	1,262,650	22.75	
Sheriff's Office						
Original requests						
MCSO 1	Hospital post in security unit and Overtime	226,109	1.82	226,109	1.82	
MCSO 2	Temporary hires to supplement court guards	95,117		0	0.00	
MCSO 3	Originally OTO only - video arraignment at MCDC and MCCF	110,000		142,000	0.00	Video arraignment at all facilities, first year of COP payment

PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
MCSO 4	Assessment and movement of booked inmates to medium security facility	86,109	1.82	0	0.00	
MCSO 6	Data entry for newly arrested	98,481	3.00	0	0.00	
MCSO 7	In jail intervention (Target Cities) additional staff	43,004	1.00	0	0.00	
MCSO 8	Training for operational and staff development	238,044	0.00	0	0.00	
Results of Review with Department						
	MCSO Warrants Positions (new)			(152,886)	(3.00)	Reduction of positions added within constraint
	MCSO River Patrol Deputy			(53,768)	(1.00)	Reduction of position transferred within constraint
	MCSO Work Crew at MCIJ			87,551	1.00	One five day post and supplies, effectively adds 10 beds, \$9,607 OTO
TOTAL Sheriff's Office		896,864	7.64	249,006	(1.18)	
Community Corrections						
Original requests						
DCC 1	Increase staffing for MIS	220,900	5.00	220,900	3.00	In conjunction with Mult2 - more support for integrated data processing
DCC 2	Family Counselor in Court Svcs	53,777	1.00	53,777	1.00	Increase fees to cover this position and relieve GF of \$30k of other costs.
DCC 3	Accesses and funds beds and sanctions for PV's with sentences less than 12 months	5,307,031	10.00	7,396,725	0.00	\$825,000 for continuation of 40 beds at MCRC, the balance awaiting a proposal for Board review.
DCC 4	Group home and case mgmt for pregnant alcohol and drug affected women or those with pre school	64,223	1.00	37,112	0.50	Part year funding, full year cost will be \$54,223. The home is being built and will not be available until partway through the year. \$10,000 startup cost, non-recurring.
DCC 5	Transfer from State, supervision and oversight for pretrial release	228,175	4.50	0	0.00	
DCC 6	STOP continuation and enhancement - Byrne grant has ended total cost is \$1.05 million	296,225	0.00	595,200	0.00	Substitutes General fund for \$355,000 of expired Byrne grant revenue, adds \$200,250 of General Fund, assumes \$200,000 of City support. Potential for expanded program based on more City support and on insurance recoveries.

PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
	DCC 7 Case mgmt for Hispanic defendants released on pre-trial supervision.	50,000	0.00	50,350	0.00	
	Total Community Corrections	6,220,331	5.50	8,354,064	4.50	
District Attorney						
Original Request						
	DA 1 DA Investigator	51,233	1.00	51,233	1.00	Assuming revenue from Portland or a Police Officer.
Results of Review with Department						
	DA 2 DDA 3 for Child Abuse Team	73,489	1.00	73,489	1.00	
	TOTAL District Attorney	124,722	2.00	124,722	2.00	
Library						
Original Request						
	Lib 1 Midland Library space, books, staff for 2 months	103,358	0.81	103,358	0.81	Midland Library space, books, enhanced staff for 2 months
	Lib 2a Public access to information through automation	265,991	1.50	265,991	1.50	\$213,991 OTO
	Lib 3 Cooperation with schools	107,600	0.00	0	0.00	Other efforts under way using technology.
	Lib 4 Purchase automated substitute staff scheduling system	19,905	0.00	19,905	0.00	About \$1,700 ongoing cost for telephone links
	Lib 5 Public information kiosk	48,834	0.00	0	0.00	Focus on information to be made accessible (Lib 2a), consider kiosk in future when data is available
Results of Review with Department						
	Lib Additional materials			100,000	0.00	
	Total Library	545,688	2.31	489,254	2.31	
Environmental Services						
Original Request						
	DES ? Staffing for Court's task force	?	?	0	0.00	Betsy Williams will handle during rotation
	DES 1 Animal Control staff recommended by Commissioner Collier	95,000	3.00	95,000	3.00	Note: additional Animal Control revenue will make this a cash neutral expansion.

PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
DES 2	Animal Control phone system (in conjunction with DES 1)	10,000	0.00	10,000	0.00	Note: additional Animal Control revenue will make this a cash neutral expansion.
DES 3	Planning - microfiche records	26,000	0.00	26,000	0.00	Note: fee increases will generate this much additional Planning revenue
DES 4	Training for department specific issues	40,000	0.00	0	0.00	
DES 5	Records archivist	39,210	1.00	0	0.00	
DES 6	Johnson Creek water quality	21,800	0.00	21,800	0.00	\$21,800 from Natural Areas Fund.
DES 7	Animal damage control	10,000	0.00	0	0.00	Should remain a State responsibility
DES 8	Feral feline vasectomies	15,000	0.00	0	0.00	
Mult 1	Additional Support to CIP	1,610,000	0.00	1,500,000		OTO
Mult 2a	PC Infrastructure recommended by DPMC	522,200	0.00	522,200	0.00	OTO (Actually budgeted in Nond, Special Appropriations
Mult 2b	Expansion of specific projects already recommended by DPMC	200,000	0.00	200,000	0.00	OTO (Actually budgeted in Nond, Special Appropriations
Results of Review with Department						
	Edgefield Station	20,000	0.00	0	0.00	Board briefing on 4/18
TOTAL Environmental Services		2,609,210	4.00	2,375,000	3.00	
<u>Nondepartmental</u>						
	MSS LAN Coordinator and PC support for 14th and 15th floor	63,862	1.00	63,862	1.00	Place in Word Processing Unit.
	MSS Em Mobile emergency command Mgmt 1 post	8,139	0.00	0	0.00	
	MSS Em Overtime for on-call Mgmt 2	17,396	0.00	0	0.00	
	MSS Emp RESULTS Training Svcs 1	297,376	0.50	297,376	0.50	
	MSS EEO Contractor Certification Finance 1 support	21,250	0.50	0	0.00	
	MSS Support for GFOA Convention Finance 2	5,000	0.00	5,000	0.00	OTO

PROGRAM AND FUNDING DECISIONS IN CHAIR'S PROPOSED BUDGET

Number	Description	Requested Amount	FTE	Proposed Budget	FTE	Notes
	NOND CIC 2 5 Year Strategic Plan	4,000	0.00	0	0.00	
	NOND CIC 3 Increase publications	7,000	0.00	0	0.00	
	NOND CIC 4 Partnership/volunteer grants	50,000	0.00	0	0.00	Consider for transfer from contingency when an example has been brought forward,
	NOND Bldg maintenance	11,000	0.00	0	0.00	
	Extension 1					
	NOND LAN	20,000	0.00	0	0.00	
	Extension 2					
	NOND .65 PDS	31,866	0.65	31,866	0.65	Backfills for reduction in State funding
	MCCF 1					
	NOND .5 PCDC and 1 CHN	145,000	0.00	145,000	0.00	.5 PCDC and 1 CHN replaces Great Start - actually budgeted in CFS
	MCCF 3					
	NOND Dynamic Differences	3,200	0.00	3,200	0.00	
	MHRC 1					
	NOND Malicious Harassment	5,000	0.00	5,000	0.00	OTO
	MHRC 2 Conference support					
Total Nondepartmental		690,089	2.65	551,304	2.15	
Reserve	Set aside to buffer State and other government funding reductions			500,000	0.00	Pending funding decisions by other governments.
TOTAL FUNDING		19,111,378	75.40	15,579,676	54.05	
General Fund cost		13,782,547		8,161,151		



MULTNOMAH COUNTY, OREGON

BOARD OF COUNTY COMMISSIONERS

BEVERLY STEIN
DAN SALTZMAN
GARY HANSEN
TANYA COLLIER
SHARRON KELLEY

BUDGET & QUALITY OFFICE

PORTLAND BUILDING
1120 S.W. FIFTH - ROOM 1400
P. O. BOX 14700
PORTLAND, OR 97214
PHONE (503)248-3883

TO: Barry Crook, Budget & Quality Manager
FROM: Chris Tebben, ASD Budget Analyst
DATE: March 13, 1995
SUBJECT: Aging Services Budget Request, FY 95-96

The Aging Services Division's (ASD) budget request has been reviewed by the Division Administration and the Budget & Quality Office. This memo outlines the major issues and decisions related to ASD's budget request that should be reviewed with the Chair's Office prior to the BCC approving the budget.

Constraint

ASD met its net General Fund constraint of \$2,440,283. The constraint was derived from last year's General Fund budget (\$3,323,857), minus carryover (\$36,458) and Federal/State Fund Service Reimbursements for Public Guardian and Adult Care Home Program (\$738,739) plus \$58,621 to correct the 1994-95 building management allocation which underestimated COP cost of the Mead building. The net constraint is derived by subtracting Public Guardian Fees and Adult Care Home Program fees.

Budget Summary:

	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	<u>Difference</u>
Staffing FTE	163.33	172.55	172.55	172.85	0.30
Total Costs	TBD	\$15,258,474	\$15,344,074	\$15,599,063	\$254,989
Program Revenues	TBD	\$13,119,897	\$12,996,898	\$13,158,780	\$161,882
General Fund Support	TBD	\$2,138,577	\$2,347,176	\$2,440,283	\$93,107

Significant Changes

- Aging Services budget for 1995-96 is essentially a 100% service level budget with no significant changes.
- FTE's: ASD increased its personnel by 0.3 FTE's. The increase was added to a .50 FTE support position in Management & Administration.
- Revenues: Oregon Project Independence and Older Americans Act revenues are projected to remain at approximately 1994-95 levels, but could still be cut by the Legislature or Congress. Medicaid reductions are being discussed, but no final decisions have been made concerning the size or focus of reductions.

- Changes in the scope of operations: ASD is proposing to expand services for East County residents if its add packages are approved. The Adult Care Home program is developing a certification procedure and redesigning the monitoring process in response to the Auditor's report.

Issues for Discussion

1. State Revenue Reductions

Medicaid revenues are likely to decline in the coming biennium, but the State and Federal governments have not yet determined the size or nature of the reductions. One likely reduction that has been identified is a change in the staffing standards for eligibility specialists and field staff who provide clients financial assistance. The new standards will reduce local field staff by 6 to 30 positions in Multnomah County, increasing workloads for remaining staff by 35-70%. This would directly affect service for elderly clients served by the Long Term Care program. The State is also considering reducing allocations by 6% to reflect the elimination of the PERS pickup, which would cut roughly \$300,000 from our Medicaid funding. Another 6% that was included in the Governor's budget for a COLA may not be approved by the Legislature. The Ways & Means Committee is also proposing to cut 114 case management positions statewide, which would result in a reduction of 28 positions in Multnomah County.

The extent and the likelihood of these cuts are not yet known, but should become clear during the budget process. I recommend that the BCC include ASD's pending Medicaid reductions with the other State cuts in considering restoration.

2. Adult Care Home Program

ASD has two add packages for program enhancements that will enable the Adult Care Home (ACH) Program to implement recommendations from the Auditor's report. One add package requests \$101,451 of General Fund to add 4 FTE's to the program, increasing its capacity to follow up promptly for homes that are out of compliance. County General Fund will be combined with Medicaid funds to add \$371,433 to the ASD budget. The other request is for \$47,569 to hire .85 PDS to develop and implement a new training program for adult care home owners and operators.

Training

The Adult Care Home Program Manager has identified training as her greatest need for improving the program in response to the audit. ACH operators surveyed by the program also indicated that training was the area with greatest need for improvement. The program believes that enhancing training is the most proactive strategy for improving adult care homes: new resources can best be leveraged at the front end to improve care, rather than at the back end to administer sanctions. The program addresses the sanctions and monitoring functions in its other add package.

ASD plans to increase the training requirements for new ACH operators from 18 hours to 30 hours, and for new resident managers from 18 hours to 24 hours. The training requirements for relicensing of ongoing operators and managers will increase from 10 to 15 hours. The program has developed an operators' qualifying test which applicants must pass before they are granted a license, and it began to administer the new test in February. Previously, operators had to pass the test within 90 days of receiving a license. The test has been upgraded from an open book exam with instructor assistance to a closed book exam that must be completed without assistance.

In addition to the enhancements for the basic operator training, the program plans to develop a series of training courses in specialty areas, such as working with clients who have Alzheimers

Disease. These courses will be available to operators to fulfill their ongoing training requirements. Certification tests will be developed for each specialty area; once this training and certification process is in place, the program will be able to make placements based on the capabilities of the home.

The ACH program is requesting .85 PDS to develop the curriculum for the basic and specialized training, and to monitor the progress of operators, managers and substitute caregivers in completing the training and certification. The PDS will identify substantive training needs and develop new courses to respond to them. The person will be responsible for tracking the progress of resident managers and operators for the 653 adult care homes, and for the 1,500 substitute caregivers who work in the homes. This will enable the program to ensure that an operator does not repeat the same course each year for his or her ongoing training, but instead takes increasingly intensive courses that match the needs of the kinds of patients the operator works with.

The training add package was initially developed as an issue and opportunity and therefore was not ranked by PMCOA or ASD, but the Division has made the other ACH add package its top priority, and feels that this should also be a top priority. The ACH Program Manager identified the training position as her highest priority among the positions requested in the two ACH add packages. I feel that this is the most promising way to improve the Adult Care Home Program and recommend that the BCC fund this request.

Monitoring

The Auditor's report recommended that the ACH program conduct unannounced visits to improve monitoring activities. In response, the ACH is changing its policy from one scheduled visit per year to two unannounced visits per year, with additional follow-up for homes with problems. ACH monitoring staff have also been given the authority to issue sanctions on the spot when they see homes that are out of compliance. This should improve ASD's ability to respond quickly to problems, but it is expected to increase the amount of time spent on appeals and hearings. In order to cope with the expected need for more follow-up visits and to follow through more promptly with problem homes, the program requests 4 new FTE's.

ACH staff must make follow-up visits to monitor the steps that non-compliant homes take in response to ACH complaints and sanctions. Long follow-up times in the past have caused legal problems and resulted in homes not being shut down until 3-6 months after the initial monitoring staff visit. The program is currently using grant funds to employ two temporary PDTs to conduct follow-up visits and inspect operator's claims of improvements. As a result of these positions, the program has been able to shut down several problem homes within three weeks of the first visit. The grant funds will expire in June, and the ACH Program Manager has made these two positions the highest priority in this add package.

The program is also requesting 1 PDT to conduct fire drills at adult care homes in response to the Auditor's recommendations, .5 Community Health Nurse to perform chart audits and to investigate claims of physical abuse, and .5 OA 2 to perform the increased clerical work resulting from doubling the number of visits. The positions are listed in declining priority. I recommend that the BCC fund this add package; if it is not possible to fund it in its entirety, the 2 PDTs should be the highest priority.

3. Public Guardian Staffing

The Public Guardian/Conservator program presently has 3 Deputy Public Guardians who maintain a caseload of 147 clients who are unable to care for themselves and at high risk of abuse or neglect. ASD is requesting \$52,768 in County General Fund to hire 1 Deputy Public Guardian, 0.5 Fiscal

Assistant, and 0.5 OA 2; the balance (\$126,491) would be provided with Title XIX funds and Federal/State reimbursement to the General Fund.

The program takes in 2.5-3 clients per month, while there is attrition of 15 per year. It has a waiting list of 15, and it has turned away 15 other clients this year because waiting lists were too long. Individuals on the waiting list are triaged by need; those in the most dangerous situations are served first. Adding 1 Deputy Public Guardian would increase the capacity from 147 clients to 190.

There are no alternative sources of care for Public Guardian clients. The program has strict eligibility criteria and serves only individuals with no alternate caregivers or financial alternatives. The pending closure of Dammasch will increase the need for Public Guardian services.

The Fiscal Assistant is requested to assist in managing the finances of the clients under conservatorship. Presently, one FS2 in Business Services manages the finances of the 147 clients. The FA would assist in these responsibilities. The OA2 is requested to help in the capacity of a case management assistant, attending to the details of clients' personal effects, ordering clothing and supplies. The program leverages the time of deputy public guardians by using clerical staff to assist in these tasks.

I recommend that the BCC fund this add package. If the BCC opts for partial funding, the Deputy Public Guardian should be the highest priority within this request. The consequences of a long waiting list for this client group are severe. This add package is directly related to the Urgent Benchmarks concerning abuse and neglect and access to mental health services.

4. East County Focal Point

East Multnomah County has experienced rapid growth in the number of elderly residents; 34% of the County's population aged 60 and older now live there, compared to 26% in 1980. County services for these clients are located at East 122nd and Division and are not convenient to Gresham residents or other far East County clients, resulting in long driving times for case managers to visit clients, and the potential for East County clients not receiving services. ASD proposes to expand services to East County by establishing a District Center to serve these residents. The Division is seeking \$84,588 to provide base funding for an East County District Center. Base funds cover the minimum operating costs for a District Center, but do not include case management services. The balance of the needed base funding is being sought from the City of Gresham. ASD will reallocate service funds among the eight current District Centers to cover case management costs.

ASD considered and rejected the alternative of reallocating funds among District Centers to cover the base funding cost requested here. ASD did not want to transfer funds from services to base costs, since that would reduce service levels for other ASD clients. ASD has also committed to holding District Centers harmless at 1993-94 levels for base funding. The Division plans to accomplish service fund redistribution during the RFP process for the eight existing focal points this year. The majority of the service funds would be reallocated from the Mid- and East-County district center, since many of the clients of the new center would be shifted from Mid-County caseloads. Service dollars are allocated based on population and acuity of caseload.

I agree with ASD's decision not to shift funding from case management to base costs to create a new center. I recommend this add package, and I share the Division's ranking of it as third priority after adult care home improvements and Public Guardian expansion.

5. SDSD Transfer to Aging Services

The State Senior and Disabled Services Division (SDSD) is authorized by statute to transfer State Disability services to counties. If Multnomah County chooses to accept the transfer, Disability

Services would be merged with Aging Services. There is overlap in the service network for older clients with disabilities and the elderly clients. However, there are fewer synergies for younger persons with disabilities, who often desire career and vocational assistance. It is unclear what position the advocacy groups for people with disabilities will take.

ASD believes that we may be required to accept the transfer if we wish to continue to receive Medicaid (roughly \$8 million of ASD's funding). They believe that it is likely that block grants may link long term care for the elderly with care for the disabled. State sources believe that the Legislature won't allow the programs to be separated.

The transfer of more State services to the County concerns me because of the present budget situation. The approval of Measure 8 makes this even more complicated because of the PERS differential between State and County employees. Additionally, the State has enacted salary freezes for the past few years, so there is a potentially significant gap between County and State salary structures. If the State transfers services without funding the salary and PERS differentials, the County may be forced to supplement salaries for the transferred employees by roughly 10% to bring them to parity.

I am troubled by the potential for future years of State reductions after services are transferred to the County. As the County assumes more State services, it may increasingly find that it must choose between discretionary spending for local priorities or backfilling State cuts.

If the State transfers Disability Services to the County, it should also pay indirect costs. Many State transfers in the past have not included indirect costs. The indirect cost rate is intended to help capture the full cost of doing business. If we accept the transfer without being reimbursed for indirect costs, the County must subsidize the costs of State-transferred services.

6. Multi-Ethnic Community Liaison

Six temporary community liaisons were hired in 1993-94 to increase access to services for ethnic minority older persons. PMCoA's Multiethnic Committee endorsed this as an effective approach to removing barriers to service, but the funding was one-time-only, so the positions ended. The Division is seeking \$69,439 to develop 1.5 permanent Case Manager positions to serve as community liaisons.

I recommend that this request be made a lower priority than state funding restorations or requests that have health and safety consequences for elderly clients. Given the limited funding available for program expansions, I recommend that ASD continue to hire bilingual case managers as vacancies arise, rather than creating Community Liaisons.

7. Alternate Transportation

ASD provides transportation to frail, low income elderly persons through a contract with Tri-Met that provides door-to-door rides using lift-equipped vehicles. There is also a small contract for taxi services for extreme situations. Many advocates for the elderly have expressed concern that existing transport services do not adequately meet the mobility needs of the frail elderly. The Tri-Met service can be extremely slow, causing long ride times for frail clients as the service stops at many different points for client pick-ups or drop-offs. This add package would provide \$45,315 to fund alternate transportation, such as a private shuttle service, as well as additional taxi service.

This request would enable ASD to enhance customer satisfaction and basic access for its most vulnerable clients. I support the concept and acknowledge the need. However, I would consider this a lower priority than the adult care home improvements or the Public Guardian/Adult Protective Services which have even more direct safety and health consequences.

8. Adult Protective Services

ASD staff are required to investigate all complaints of abuse or neglect of older people. The Division is requesting \$30,878 (which it would use as match to add \$68,140 in Medicaid funds) to add 1.5 FTE to improve its Adult Protective Services response. State standards mandate that reports must be done within 60 days of the completion of the investigation. Complaints have increased by 17% over the past two years, and investigations have increased by 31%. ASD staff are no longer able to perform investigations within the mandated period. The investigations and reports are part of the sanctioning process; if there is too long a delay between the alleged incident and the report, the information is no longer useful for the sanctioning process. Another concern is that the longer it takes to complete a report, the more likelihood for a repeated incident of abuse.

ASD requests 1 Case Manager Senior and .5 OA 2 to improve its ability to perform timely investigations. I recommend that the BCC fund this request, both to bring the County into compliance with the State mandate, and to prevent incidents of elder abuse by responding quickly to abuse charges. This is directly related to the Urgent benchmark concerning the prevention of abuse against the elderly.

9. Elder Safety - statistics

There is currently no consistent collection of statistics on crimes against the elderly in Multnomah County. Data is collected by the DA's Office, law enforcement agencies, and by ASD. Different definitions are employed, making it impossible to compare information. The Division proposes to develop a coordinated tracking system for crimes against seniors. This would assist the Adult Protective Services efforts. ASD has made no specific funding request for 1995-96.

Before developing a new data system, ASD should collaborate with law enforcement agencies and the DA to explore whether this could be accomplished within existing systems. By developing common definitions and reporting standards, it may be possible to improve the tracking of crimes against the elderly without a substantial financial investment.

10. COLAs for contractors

ASD's request for \$13,897 for COLAs for contractors should be addressed by making a countywide decision on COLAs for contractors. For equity reasons, the County should provide COLAs for contractors in all County departments if it provides them at all. If the County chooses to give contractors COLAs, it is not clear whether it should be done for all contracts or for General Fund-supported contracts only. There are clear equity issues in providing one set of contractors with COLAs while denying others, but paying COLAs on state-funded contracts would increase County obligations for non-County responsibilities.

The strongest argument for paying COLAs for contractors is that it will prevent the service reductions that are otherwise inevitable. However, this treats contractors differently from County departments, who received no COLAs for their expenses.

ASD has asked for a 2.8% COLA for its General Fund contracts only. If the County provided COLAs for all ASD contractors, the cost would be approximately \$94,500. The Budget Office is developing an estimate of the cost of providing COLAs for all County contracts.

cc: Beverly Stein, County Chair
Bill Farver, Executive Assistant
Meganne Steele, Staff Assistant

Jim McConnell, Aging Services Director
Carol Rex, ASD Deputy Director
Kathy Gillette, Administrative Service Officer



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TO: Barry Crook, Budget and Quality Manager
FROM: Ching Hay, Budget Analyst *CH*
DATE: April 17, 1995
SUBJECT: Budget Analysis of Auditor

1. Constraint Discussion

Constraint is \$555,605 which is this years adopted budget less \$15,000 for one time only computers and an addition of \$7,848 for facilities. The Auditor has requested \$555,600 for 1995-96 which is within constraint.

2. Table of Budget Facts

<u>Budget Trends</u>	1993-94 Actual	1994-95 Current Estimate	1994-95 Adopted Budget	1995-96 Proposed Budget	Difference
Staffing FTE	6.96	7.00	7.00	7.00	0.00
Personal Services	401,507	423,649	450,649	443,204	(\$7,445)
Contractual Services	362	38,500	3,500	3,500	0
Materials & Supplies	24,513	100,108	93,608	108,896	15,288
Capital Outlay	0	14,707	15,000	0	0
Total Costs	\$426,382	\$576,964	\$562,757	\$555,600	\$0
Program Revenues	0	0	0	0	0
General Fund Support	\$426,382	\$576,964	\$562,757	\$555,600	\$0

3. Significant Changes

4. Add Packages

The Auditor's request has no significant changes or add packages.

5. Issues for Discussion

Use of Vacancy Savings to arrive at constraint. The Auditor's Office is using \$10,442 of salary savings to arrive at constraint. This is possible this year because of maternity leave. Savings may be difficult to find in future years if constraints remain tight. The funds will have to be found for future years if there are no vacancies.

Improving mail survey of citizen attitudes about government. There is no extra cost associated with this. It would entail some time and effort in developing these improvements, such as the use of focus groups.

6. Budget Office Recommendations

From discussions with the Gary Blackmer, I recommend that the Auditor's office proceed with a limited survey beyond the regular survey that would ask for opinions about the regular survey and to conduct several focus groups in conjunction with Departments that would be get more detailed answers about the services that the County provides. An example would be to get answers to why those who feel dissatisfied with parole and probation say they are dissatisfied, and get their opinions on how the County could improve.

c Gary Blackmer, County Auditor



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TO: Barry Crook, Budget & Quality Manager

FROM: Keri Hardwick, DES Budget Analyst

DATE: April 17, 1995

SUBJECT: Assessment & Taxation Budget Request, FY 95-96

The Assessment and Taxation (A&T) Division's Budget Request has been reviewed by the Division, the Department of Environmental Services (DES) Administration and the Budget & Quality Office. This memo provides background and a short discussion of the issues and budget decisions that should be reviewed with the Chair's Office prior to the BCC approving the Budget. As you know, although A&T is part of the total DES budget, their budget must be reviewed and approved prior to the rest of the department because of State Department of Revenue regulations. An approved budget must be submitted to the DOR by March 1. They then review the budget and determine whether they believe the County has allocated sufficient resources to perform the mandated duties, and we are reimbursed for approximately 22.5% of eligible expenses. In 1993-94, this reimbursement was approximately 2.4 million dollars. Legislation has been proposed to allow A&T's budget to correspond to the same timelines as other County programs.

Constraint

The constraint for General Fund program expenditures in A&T is \$565,358. This is the same amount as in the Adopted Budget for 1994-95. The budget request is \$564,376, under constraint by \$982. The constraint for the General Fund cash transfer to the A&T fund is \$7,557,694, the amount in the Adopted Budget less \$28,335 in carryover. The requested amount is \$7,546,634, under constraint by \$11,060. Since constraints are managed at the Department level, A&T's budget request as compared to constraint should only be viewed in the context of helping or hindering the Department making their constraint target.

Budget Summary:

	1993-94 <u>Actual</u>	1994-95 <u>Current Estimate</u>	1994-95 <u>Adopted Budget</u>	1995-96 <u>Proposed Budget</u>	<u>Difference</u>
Staffing FTE	155.00	160.00	160.00	160.00	0.00
Total Costs	\$9,920,306	\$12,813,510	\$13,401,906	\$12,176,767	(\$1,225,139)
Program Revenues	\$5,613,371	\$6,947,093	\$7,502,799	\$6,546,770	(\$956,029)
General Fund Support	\$4,306,935	\$5,866,417	\$5,899,107	\$5,629,997	(\$269,110)

Significant Changes

- FTE's: Although there was no net change in FTE's in the Division, positions were reallocated among the programs. An Appraisal Specialist was transferred from Personal Property to Residential Appraisals because the function of appraising houseboats has also been transferred to Residential Appraisals. A total of 1.68 FTE's of clerical staff were moved from Tax Title administration (.33), Board of Equalization support (.35) and Document Recording (1.00) into Tax Collections.
- Implementing recommendations from TRIM project: A&T has been undertaking a continuous quality improvement/business process re-engineering effort called TRIM (Tax Roll Maintenance) in FY 1994-95. The first two recommendations of that project are an imaging system and upgrades to the Intergraph GIS system. Both of these projects are more fully described below. The Budget Request includes \$158,100 in payments to finance \$657,000 in order to implement these projects.
- Tax Title program accounting change: In 1994-95, the expenditures for the Tax Title functions of both A&T and Facilities were made out of the A&T Fund, and were paid by a service reimbursement from the Tax Title Fund. In 1995-96, these expenditures will be made directly from the Tax Title Fund, eliminating what appears in the Adopted Budget as \$807,737 in expenditures and revenue. This figure only represents the transfer of money between the two funds. This does not indicate any change in the actual expenditures or revenue of the programs.
- Tax Title program: Sales from foreclosed properties are forecasted lower by \$350,000 for 1995-96 due to several factors: a new process assisting delinquent taxpayers to avoid foreclosure; more properties were repurchased with lump sum payments, thereby reducing contract revenues; increased property values have allowed refinancing to reduce foreclosures; and more properties are being transferred to non-profit organizations rather than sold. This reduction in revenue results in reduced pass-through to other jurisdictions, but does not impact County operations.
- Increases in document recording activity have resulted in a projected increase of \$290,000 (14.5%) for the General Fund.

Issues for Discussion

1. Imaging System:

A&T's TRIM project has resulted in a recommendation to purchase an imaging system in for the Document Recording program. The project is estimated at \$500,000 at this time, which would be financed over five years. This figure should be considered a reasonable estimate, but a truer estimation of costs will not be known until more information has been received from potential vendors. The study regarding the Recording function indicates that changing to an imaging system will allow one FTE to be transferred to Tax Collections, and reduce expenditures in Materials & Services and Capital by approximately \$80,720 annually because the new system will allow the streamlining of a currently cumbersome process.

The more important change is that this system will eliminate the need for A&T to take the document to be recorded from the citizen, keep track of it, photocopy it and mail it back. The document will only be out of the customer's possession for a few minutes while it is scanned. This represents a significant increase in customer service to those with documents to be recorded. This system will also create an increase in service to those who need to see recorded documents. As we will store a digital image rather than a photocopy, transferring and duplicating the document will be an easier process and will result in clearer copies.

2. GIS System Upgrade

The current Intergraph system was purchased seven years ago, and the vendor has since made major technological changes in both hardware and software. They have indicated they will cease support for our current system. The estimated price is \$157,000, which will be financed for five years. The upgrades will provide a more efficient system for A&T, and will allow for more efficient transfer of information with the State and Metro.

Implementing this upgrade at A&T does not affect the choices of other County agencies regarding GIS, and it will allow A&T to more expediently create the base layer those other programs, and other outside agencies, need to have in place.

3. Legislative Issues

There are currently five bills in the State legislature proposing limitations on appraised value. Aside from the revenue implications of these bills, each would also necessitate major, and costly, changes to the A&T systems. As each bill is different in its specifics, we are unable to estimate the potential costs of this change.

HB2325 shifts property tax appeals to a magistrates office which would be created in Tax Court. Counties would have to defend their work in this magistrate's court, which would likely increase our costs and require attorney's representation. In addition, if the taxpayer prevails, the taxpayer may recover all litigation costs from the defendant (County or DOR). No such provision is made if the County or State prevails.

The A&T reimbursement is also expected to be discussed in the current legislature. The bill creating it sunsets in 1997, but funding levels could be changed this year.

4. Board of Equalization

The DES CBAC, the County Auditor and the Central CBAC dedicated fund review have all recommended separating support for the Board of Equalization from A&T. A variety of new locations for the BOE have been suggested. At first glance, this does not appear to be more than a small organizational change and should be a fairly simple recommendation to follow. However, as noted in the DES response to the County audit, this would be an expensive change to make. Furthermore, it is important to understand that no one suggesting this change has found anything other than a *perception* of a conflict of interest. Absolutely no evidence of a real conflict exists.

Budget Office Recommendations

I concur with DES's recommendation regarding the Board of Equalization. Although it is unfortunate, there are many more critical areas for funding than relieving a perceived, but not actual, problem.

The two systems projects are the two new issues within A&T's budget which require policy direction. Since data processing on the whole is in a major state of change within the County, decisions regarding systems acquisitions, upgrades and changes are especially difficult. We must also recognize that although strategic planning efforts are underway, we must continue to conduct the business of the County, and continue to make improvements in that process even if they involve changes in information technology. We can strive, at this point in the process, to ensure decisions made today are forward thinking and conceptually in line with the strategic vision that has been developed to date. Under current County policies and ordinance, both of these projects must also be approved by the DPMC. It must be assumed that their review will also consider strategic factors.

Both of these projects make sense from the business perspective. They both result in cost saving efficiencies and allow us to more readily serve the needs of our citizen customers and government partners. The GIS project has no discernible impact on the County's overall GIS position. Because of these reasons, I believe the project should be funded. A discussion should take place regarding increasing DES's General Fund allocation in order to fund this entire project in FY 1995-96, because a one time \$100,000 increase would save approximately \$34,000 in interest over the next five years.

The imaging project is more difficult to recommend without hesitation. Again, from an efficiency and customer service standpoint, this project is extremely worthwhile, and I have no doubt that A&T and their customers would be far better served by this technological solution than by adding FTE's and Materials and Services funds to provide worse service at a higher cost. However, the implementation plan is incomplete, exactly what this

system will look like based on vendor specifications is not yet known, nor is the total price of the project. It is also true that county-wide imaging can not be a reality until the wide area network is in place. My recommendation is that the funding for the payment is left intact, because to do otherwise would result in more money being budgeted to perform the recording function, just in different categories. The Division and Department have agreed that once the full scope of the project is known, the first review as to the adequacy and strategic value of the project first be examined by the Department, and then by the DPMC. System implementation should only proceed when both those groups agree that this is our best long term solution.

cc: Beverly Stein, County Chair
Board of County Commissioners
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Meganne Steele, Staff Assistant
Betsy Williams, DES Director
Mike Oswald, DES Management Analyst
Rich Payne, DES Management Analyst
Lance Duncan, DES Fiscal Specialist
Janice Druian, A&T Director



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TO: Barry Crook, Budget & Quality Manager

FROM: Chris Tebben, CFSD Budget Analyst

DATE: March 8, 1995

SUBJECT: Community & Family Services Budget Request, FY 95-96

The Community & Family Services Division's (CFSD) budget request has been reviewed by the Division Administration and the Budget & Quality Office. This memo outlines the major issues and decisions related to CFSD's budget request that should be reviewed with the Chair's Office prior to the BCC approving the budget.

Constraint

The direct 1995-96 General Fund constraint for Community & Family Services is \$13,577,836. In addition, General Fund provides \$930,702 support for Indirect costs, for a total General Fund cash transfer of \$14,508,538. This was derived by determining last year's General Fund cash transfer net of General Fund-paid Indirect Costs (\$13,448,706), and adding \$123,184 to annualize the cost of programs funded for part of 1994-95. The increased rent for the Hooper Center (\$5,946) was also added to the constraint.

Budget Summary:

	1993-94 Actual	1994-95 Current Estimate	1994-95 Adopted Budget	1995-96 Proposed Budget	Difference
Staffing FTE	227.54	284.90	284.00	309.14	25.14
Total Costs	TBD	\$79,159,860	\$83,076,003	\$77,856,208	(\$5,219,795)
Program Revenues	TBD	\$65,602,160	\$68,854,158	\$63,347,670	(\$5,506,488)
General Fund Support	TBD	\$13,557,800	\$14,221,845	\$14,508,538	\$286,693

Significant Changes

- FTE's: The budget request contains a net increase of 25.14 FTE's. Of the total increase, 5.44 are increases for 1995-96, and 18.8 are planned additions for the 1994-95 fiscal year that have not yet been approved in Bud Mods. Of the 5.44 FTE increase for 1995-96, 2.2 FTE are funded with GIFT funds transferred from JJD, 2.74 FTE are funded with General Fund vacancy and salary savings, and 0.5 FTE is funded with grant funds. In addition, many positions were reallocated among the programs. The Integrated Services activity was created by reallocating 5 FTE's from Community Action, Division Management and Resource Management. The Contracts Evaluation Unit was formed by transferring staff from Resource Management.

- Revenues: The budget request reflects net revenue reductions of \$5.2 million. The majority of the cuts are State revenues (discussed below). The State reductions are focused primarily in services, rather than allocations to local administration. In addition, federal Low Income Energy Assistance Program funds were cut by \$1.8 million.
- Contracts: Contracts were reduced by \$6.4 million. The largest reductions were in Adult Mental Health (\$3.5 million). Alcohol & Drug (\$1.4 million) and Community Action (\$1.5 million) also had significant reductions. Developmental Disabilities increased contracts by \$1.6 million.
- The program budget structure changed in several areas. Public Affairs was merged into Division Management, the Contracts Evaluation Unit was formed by transferring staff from Resource Management, and Integrated Services was created by transferring resources from Community Action, Division Management, and Resource Management. In Alcohol & Drug, the Sobering & Detox activities were merged, and Target Cities was established as an activity center. The Children's Mental Health & Youth Policy Office was renamed the Children & Youth Program, and it reduced the number of activities from 10 to 8. Level 7 was merged into Intervention, Growth Promotion was renamed Early Childhood Development, and Specialized Services was dissolved and transferred into the remaining activities.

Issues for Discussion

1. State Mental Health Cuts

The Governor's budget proposes over \$1.5 million in cuts for mental health for 1995-96. With these cuts, the State mental health system is becoming a Medicaid-only system, eliminating \$1,079,585 for outpatient mental health care for non-Medicaid eligible adults, \$380,504 for non-Medicaid eligible children, and \$154,030 for the SEEDS program for individuals with serious mental illness who are disaffiliated from traditional services. There are no alternative systems in place to provide services for these populations. The elimination of outpatient adult mental health will have direct fiscal consequences for the County, since the County is payer of last resort for adults held under the commitment process. For adults whose illness progresses to this point, the County must pay for their care, at a cost of \$600 per day.

Determining an appropriate response to State cuts is problematic. It appears that the State has made a policy decision to eliminate mental health services for non-Medicaid eligible individuals, and it may not be likely to alter its decision. If the County hastens to backfill State cuts, there is even less incentive for the State to restore funding later in the legislative session. The County must weigh the consequences of eliminating services to non-eligible populations against sending a message to the State that we will assume State responsibilities.

The BCC should address the issue of backfilling state cuts by examining the county-wide impact of the cuts and the effect that backfilling may have on future State decision-making. The Board should first determine whether to assume *any* State funding responsibilities. If the Board decides to restore State funds, it may be useful to apply these criteria to decide which areas to restore: relation to Urgent Benchmarks; public safety consequences, and impact on County funding responsibilities.

I recommend that the BCC defer any decisions to restore State cuts, but reserve at least \$1 million that can be used for restoration later in the Budget process after we are more certain of the Legislature's positions. I don't recommend full restoration, both for budgetary reasons, and because of the message it sends the State. Instead, I think we should partially restore funds in all three programs. The public safety consequences, overlap with the Benchmarks, and the County's fiscal responsibility as payer of last resort make this a priority area.

2. Managed Behavioral Health Care

CFSD is poised to begin two major efforts in managed behavioral health care. The A&D program has agreed to provide chemical dependency services for CareOregon under the Oregon Health Plan beginning in April, 1995. The Children & Youth Program has submitted a Medicaid waiver request that would capitate children's mental health services. For the foreseeable future, the County will be operating two systems, with some customers served in a managed care system, while others are served on a fee-for-service basis.

For both managed care ventures, the proposed rates fall far short of our estimated costs, requiring County subsidy in order to participate. In the short term, CareOregon is subsidizing the chemical dependency capitation rate by 32% and subsidizing billing costs, and A&D is using Target Cities funds to provide assessments and is subsidizing its administrative costs. The State is proposing a capitation rate for children's mental health that falls far short of the estimated costs. Since the children's capitation is on a much larger scale (over \$12 million per year), the risk is considerably greater. The County may find that it must subsidize the system in the short run in order for managed care to be viable, although the CFSD staff are attempting to design a service package that would allow us to keep costs within the capitation revenues. A second problem with both projects is that many of the high-cost services are excluded from the plan, significantly reducing the savings associated with managing patients out of high-end services to less-intensive care. This issue might be worth taking up with the appropriate federal and state agencies as an Oregon/Multnomah Option.

CFSD has made managed care a high priority for next year because it believes that the entire behavioral health system is moving rapidly in that direction. One of the main arguments for vigorous participation in managed behavioral health care is the opportunity to define the system. The County can exercise a leadership role, determining standards of care and maintaining access for vulnerable populations. If the County chooses not to participate, private providers may shift costs to the County by limiting access or treatment, resulting in larger public health or safety problems. These costs must be weighed against the County's assumption of risk and willingness to subsidize its participation in deciding the level of involvement we seek in managed behavioral health care.

CFSD is requesting \$398,295 to develop a behavioral health managed care organization. The staff of 7 FTE's would serve in a division-wide planning and administrative capacity for managed care. This structure would be somewhat redundant with other administrative positions serving the non-managed system, since both systems would continue to operate in the short term. If CFSD assumes a brokering role, this structure would also duplicate the administrative structure of the Primary Health Plan.

Before developing a full administrative structure, the BCC and CFSD should examine the short- and long-run implications of managed care. Because of the high levels of financial risk, it is also important to weigh the alternative of not participating. The BCC should consider whether there are other roles the County can play in shaping the system besides direct participation.

If the Board decides that the County should become substantially involved in managed behavioral health care, CFSD needs more planning capacity than is presently available. However, the current uncertainty about the status of children's capitation and chemical dependency warrants a more scaled-back approach than what CFSD is proposing. One option may be to hire contractors to study managed care feasibility and assist in planning and system design, rather than creating new positions. Alternatively, the creation of 2 dedicated positions would substantially expand our planning ability without heavily subsidizing the system. County supported-positions should be of a limited duration; ultimately the system should be able to pay for itself and related costs.

3. Management Information System

The development of a management information system in CFSD is an excellent opportunity for the County to advance its information technology capability, particularly in the area of system integration. CFSD exchanges data with an extensive provider network, other County departments, community partners, and state & federal agencies. The system will be used for a wide range of purposes - tracking performance data, contracts monitoring, client information, budget tracking, billing and accounting - and connecting with a variety of networks and platforms. In addition, the Division's upcoming involvement in managed care will require a degree of sophistication in information processing that surpasses current capabilities, and the high financial stakes make system integrity essential.

CFSD's add package requests \$195,000 to help the Division meet two needs: improve reporting and data-collection in the immediate term, and develop an integrated MIS over a longer period. The complexity of CFSD's data transmission and the scope of the intended uses of the system will require a long development period to thoroughly study system integration issues. In the meantime, the Division needs to begin to identify and collect data to meet its immediate reporting needs. The requested Data Analyst positions will work on both tasks. The individuals hired for these positions should have program knowledge as well as technical expertise since the identification of user needs will be a major part of their responsibilities.

The Division is requesting \$57,000 for consultation in this add package, including \$50,000 to augment the funds DPMC approved for a requirements study. CFSD asked DPMC for \$100,000 for a requirements study; \$50,000 of their request has been approved to date. DES is presenting an add package to fund the DPMC requests; if this add package is approved, CFSD will receive the remaining \$50,000 it requested, and this add package should be reduced by \$50,000.

This request is CFSD's highest priority. In addition to the requested funds, the division has reallocated \$125,000 in existing funds to add a file server to its LAN, to obtain outside consultation, and to create an MIS Administrator position, for which it recently posted an announcement.

CFSD's information system should be developed in alignment with the County's information systems plan. Future support and development needs should fit the framework that will be developed by the Information Systems Strategic Planning Committee.

A final concern regards the level of computer infrastructure in CFSD. During the exploration of County-wide e-mail, CFSD's insufficient PC infrastructure was an important determinant of the final decision not to adopt a County Microsoft Mail standard. If the intended system is to be PC-based, a computer purchasing plan should be coordinated with the system development, so that users will have access when the system is operational.

4. Centralized Crisis Triage Unit

The proposed centralized crisis triage unit is a pronounced departure from the existing mental health crisis system. The unit would provide a coordinated system for individuals in mental health crisis, clarifying a bewildering array of services and responding to the full range of factors driving consumers' behavioral health needs. It is a dramatic expansion of the current system that would require a substantial increase in resources.

CFSD's issues statement outlines the advantages of a centralized system. They present a compelling argument for coordination, which may improve public safety, reduce commitments, and better meet individual's crisis needs. CFSD's analysis thoroughly covers the tradeoffs from a service-provision standpoint, so I will focus on budgetary aspects.

An additional \$2.9 million of ongoing funding is required to develop the recommended crisis system model. Some of this money will be solicited from other organizations that rely on or benefit from the crisis system, including community resources. Outside sources have not yet been approached, so it is unclear how much will be requested from the County. One important consideration is whether other organizations will contribute funding on an ongoing basis or one-time-only. If the outside funding is not stable, the BCC may be forced to make program reductions in other areas in future years to continue to operate the crisis system at full capacity.

The BCC should also consider whether the creation of a County-run crisis system would result in additional State cost-shifting. The State may transfer additional crisis responsibility to the County if it perceives that the County is increasing its financial responsibility for crisis care. The Board should consider whether the crisis system could be developed in partnership with the State, rather than relying solely on local and community resources for the added costs of the new system. Another alternative is to work with neighboring counties to persuade the State to design a regional crisis center. This would mitigate some of the jurisdictional issues around crisis care, and it would vest primary crisis care responsibility with the State.

Because the proposed system is such a significant change from the existing system, it cannot be analyzed in incremental terms. The new system would require far more resources than the County presently commits to crisis care. In deciding whether to approve it, the BCC should consider whether the expected outcomes justify this expenditure (both absolutely and in relation to other requests for funding).

5. Unanticipated Facilities Management Overhead

CFSD is requesting \$46,018 in General Fund to cover the Facilities overhead for its leased space in the Commonwealth Building. The Division was not informed of the surcharge at the time of the discussions about the new space, and it did not hear about the charge until late January after the lease was signed, so the costs were not factored into its space determination. CFSD determined its square footage based on its previous space cost, and it would have chosen a smaller area if it had known the overhead would be included. While I realize this will cause hardship within CFSD, I feel that there are more compelling claims on the General Fund. However, it is important to note that this will cause program reductions.

The Facilities overhead rate is applied to all leased space, not just County-owned facilities, in order to recover our full costs. Despite my recommendation, I regret the information gap that caused this misunderstanding, and I recommend that we update the administrative procedure regarding the leasing of space to avoid future mishaps. As the County becomes more customer-focused in its operations, it is important to identify these communications gaps to assure that customers can make fully-informed decisions.

6. Hooper Center

CFSD is requesting \$138,921 for the Hooper Sobering & Detox Center, operated by Central City Concern (CCC). This request is for a 24% increase over the current General Fund portion of the contract. The Division made a contingency request this fall to cover an operating deficit at Hooper. I recommended that the Board refuse the request, since Hooper's 1993-94 financial statements indicated a surplus, and because the request did not meet the County's financial criteria for contingency funding. The current add package requests funds for two reasons: to correct Hooper's operating deficit, and to cover Hooper's cost increases from the current year contract. In reviewing this request, CFSD's CBAC decided that CFSD should not pay for Hooper's cost increases, since the Division is not providing COLAs for its other contractors this year. I agree that this would raise equity issues among CFSD's providers and may open a floodgate of similar requests.

The portion of the request regarding Hooper's deficit is more difficult to disentangle. The Sobering operation is a quasi-law enforcement operation, designated in statute as the alternative to jail for publicly intoxicated individuals. Police admissions account for 70% of total admissions, and Hooper has no ability to reduce these. Except for a small amount of sobering fees, the County is the sole revenue source for the Sobering program. By contrast, the Detox program has other revenue sources; including insurance. It might be possible for the County to reduce the number of Detox beds it purchases, allowing CCC to add other clients and revenue sources, or for the County to help Hooper to collect insurance for Detox participants. The Oregon Health Plan's chemical dependency coverage may also increase insurance receipts.

Both programs are 24-hour-operations. This limits CCC's ability to reduce costs, since staffing comprises 70% of the Sobering and Alcohol/Drug Detox costs. Operating statements for this fiscal year do reveal a deficit. I am still analyzing the size and causes of the deficit. Preliminary analysis suggests that most of the deficit is in the Detox program. Since the County is the sole revenue source for the Sobering operation, we may have an obligation to address any deficits there either through increased appropriations or by working with CCC to reduce costs. CCC has more ability to increase third-party revenues for Detox, so we should identify and weigh all alternatives before appropriating more funds there.

7. Developmental Disabilities Respite Care

CFSD is requesting that \$50,000 be added to Developmental Disabilities to provide respite funding. The Board appropriated \$100,000 for respite services last year, of which \$50,000 were allocated to the DD program. Before expanding respite funding, the County should evaluate the results of the respite programs currently in place. Such examination may point to either a reallocation of the respite funds within CFSD, or an opportunity to target assistance to the situations where there is greatest risk or need. In a year when many programs are being scaled back and entire populations are losing treatment services, respite care expansion should be a low priority.

8. Comprehensive Program Evaluation - no new General Fund requested

The Contracts & Evaluation Unit (CEU) was established during 1994-95. The CEU is working with the Juvenile Justice Division and Health Departments to determine whether it will provide contracting services for them as well as CFSD. There is a tradeoff between separating a function such as contracting into its own unit, where contracting expertise may best develop, or dispersing it throughout programs, where it may be linked with program knowledge. In creating an independent contracts & evaluation unit, it is critical to establish and maintain strong lines of communication between the CEU, fiscal, and planning staff so that all staff have access to needed information.

9. CFSD Training - no new General Fund requested

CFSD increased its training budget to \$155,590, an 11.6% increase. Training represents 1.04% of total personnel expense, still far short of the Benchmark goal of 2% for 1995. Of its training budget, CFSD has dedicated \$5,000 to Division-wide diversity training, and \$15,000 to RESULTS-oriented training.

cc: Beverly Stein, County Chair
Bill Farver, Executive Assistant
Meganne Steele, Staff Assistant
Lorenzo Poe, CFSD Director



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MEMORANDUM

TO: Barry Crook, Budget & Quality Manager

FROM: Shaun Coldwell, Budget Analyst

SUBJECT: DEPARTMENT OF COMMUNITY CORRECTIONS
BUDGET REQUEST 1995-96

DATE: March 8, 1995

This memo will serve as a summary for purposes of discussion of the DCC budget request for fiscal year 1995-96.

Constraint Calculation

The DCC constraint was based on the 1994-95 general fund allocation, with some adjustments:

- Eleven positions, one work unit, were added by the Chair for 1994-95 for six months of the year. The Board later extended that period to cover a total of nine months. The constraint was adjusted by \$285,612 to annualize those positions.
- DCC came in with their 1994-95 budget request \$239,058 under constraint because of carryover of state funds in the second year of the 1993-95 biennium. The Budget Office added that amount back to keep the department in line with their general fund allocation.
- The Building Management costs were redistributed countywide to reflect the first year's actual needs. The DCC constraint was adjusted by \$37,007 to account for increased costs.

DCC Budget Request 1995-96
March 8, 1995

Expenditures

DCC has addressed the resource changes by various program and operational changes:

MCSO DROP Bed contract	\$(870,390)
STOP Program contract	(750,250)
Violation/Custody Beds	(419,310)
Vehicles (94-95 purchase)	(114,300)
Rent Adjustments	(240,000)
3% Salary Savings	(403,175)
Substance Abuse contract	100,000
Mental Health Services contract	80,200
Housing contracts	140,000
Position additions - 5.65 FTE	<u>331,500</u>
Significant Expenditure Changes	\$(2,145,725)

Add Packages Requested

The Budget Office overall recommendation for the DCC program additions for 1995-96 is that, until we know the levels of state funding for the next biennium, and the recommendations of the Criminal Justice System Task Force, new programs not be added. The first request, for staffing to support information systems and users, is a program efficiency that should be granted.

1. Increase staffing to support the Department's information system and users.

Department Rank = 1
Cost = \$220,900 (ongoing)

DCC will propose a plan and budget modification in March 1995 that will allow them to move towards building an open architecture information system capable of linking to existing county, state and city organizations with the potential of sharing databases.

This package for fiscal year 1995-96 includes 3 Data Analysts and 2 Computer Technicians for a total package cost of \$220,900.

This proposal is in line with the current thinking of the SPIT (Strategic Planning for Information Technology) Committee.

Budget Office Recommendation

The Criminal Justice System struggles with the need for shared information between federal, state and local agencies. New technology promises to help fill the information gaps. With the County's current efforts towards finding greater operational efficiencies throughout the

March 8, 1995

Budget Office Recommendation

This proposal as an add package at this time is premature. The County is currently working through a Criminal Justice System Task Force to review the current system, determine the needs of the system and the solutions to those needs. This funding source should be taken into account within the context of the systemwide review to determine the most effective use of that resource.

4. Group home and case management services for disabled women (alcohol/drug addicted) who are pregnant or have legal custody of one pre-schooler and are actively participating in treatment.

Department rank = 1

Cost = \$64,000 (\$54,000 ongoing)

Over 2,000 women are on probation or parole in Multnomah County. The majority (estimated at 75%) of women have children, and safe drug-free housing is at a minimum. The current contracted housing provided by DCC is for single women; DCC Women's Transition Services has provided limited transitional housing for women and their children for over three years. During 1994, DCC applied for and received priority rating from the Housing Authority of Portland to operate a group home for this population. HAP is responsible for securing funds for the development of the project and DCC will be required to place residents into the home, provide resident management, supportive services, ongoing maintenance collect rent and pay utilities and insurance.

Tenants of the transitional housing (approximately 12 women and their children per year) will receive services through already existing services and one full time case manager. The anticipated services include parenting, life skills training, housing readiness assistance, alcohol and drug treatment, pre-employment classes and case management.

The proposal includes a Corrections Counselor position, supplies, rent subsidy payments, and operations and maintenance costs for the home, at a total cost of \$64,223. Approximately \$10,000 of this amount is for furniture and equipment, and should not be an ongoing cost.

Budget Office Recommendation

This appears to be a relatively low cost to the County for getting more clients served in alcohol and drug free housing. I recommend delaying the decision on funding this addition until the level of state funding has been determined.

DCC Budget Request 1995-96
March 8, 1995

The funding for the program in 1994-95 was:

Byrne Grant	\$355,000 (expired)
City of Portland	100,000 (expired)
State funds	4,025
County General Fund	<u>296,225</u>
TOTAL	\$755,250

The proposal for 1995-96, with expansions is:

New revenues	\$680,000
Client fees	65,000
State funds	4,025
County General Fund	<u>296,225</u>
TOTAL	\$1,045,250

Budget Office Recommendation

This is a highly effective program that creates efficiencies for the courts, the District Attorney, and law enforcement agencies both in the immediate and long term ranges.

The increase in the alarm fees and the change in the distribution of those fees will require a change in the Alarm Permit agreements between Multnomah County and the participating cities. It is unknown at this time that the revenues to support the program, either at the current level or the increased level, will be there. Furthermore, the general fund support for this program, in light of the grant expirations, has been used for other purposes. The support for this contract would either have to be added from the general fund, or the department's budget reworked.

7. Program to provide a range of case management services for Hispanic defendants released to pretrial supervision.

Department rank = 2
Cost = \$50,000 (ongoing)

About 25% of the Hispanic detainees in Multnomah County are released on recognizance. DCC believes that a larger percentage of Hispanic defendants could be released if adequate resources (culturally specific case management and supervision) were available. Hispanic defendants are often denied release because of a lack of family, community, or employment ties, or a history of failure to appear. A culturally specific case management program could help assure that Hispanic defendants keep their court dates and help the county make more effective use of its jail beds.

This proposal includes \$50,000 for contract services.

DCC Budget Request 1995-96

March 8, 1995

This budget represents a continuation of most of the programs provided in 1994-95. Until more information is known on levels of state funding for current services levels; impacts due to Ballot Measure 11 on adult and juvenile systems; and the outcome of the Criminal Justice System Task Force process, the department has prepared a plan to deal with the future as we know it now.

**cc: Beverly Stein, County Chair
Bill Farver, Executive Assistant
Meganne Steele, Staff Assistant
Tamara Holden, DCC Director
Cary Harkaway, DCC Deputy Director
Susan Kaeser, DCC Management Assistant
Dave Warren, Budget & Quality Office**



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MEMORANDUM

TO: Barry Crook, Budget & Quality Manager

FROM: Shaun Coldwell, Budget Analyst

SUBJECT: DISTRICT ATTORNEY'S
BUDGET REQUEST 1995-96

DATE: March 16, 1995

This memo will serve as a summary for purposes of discussion of the District Attorney's Office budget request for fiscal year 1995-96.

Constraint Calculation

The District Attorney's constraint was based on the 1994-95 general fund allocation, with no adjustments:

District Attorney 1994-95 General Fund Allocation	\$10,026,306
1995-96 General Fund Constraint	\$10,026,306
DA General Fund Budget Request	\$10,026,306
Difference	\$0

DA Budget Request 1995-96
March 16, 1995

Budget Summary

Budget Trends		1994-95	1994-95	1995-96	
	1993-94	Current	Adopted	Proposed	
	Actual	Estimate	Budget	Budget	Difference
Staffing FTE	183.00	188.00	187.50	187.82	0.32
Departmental Costs	\$11,391,059	\$11,780,176	\$14,479,966	\$13,844,382	(\$635,584)
Program Revenues	\$4,988,571	\$4,354,975	\$5,119,233	\$4,402,907	(\$716,326)
General Fund Support	\$6,402,488	\$7,425,201	\$9,360,733	\$9,441,475	\$80,742

Significant Changes

Resources

Reduce Video Poker revenue	\$(760,470)
Forfeiture carryover into 1994-95	(245,566)
Anti Drug Grant Expiration	(147,444)
FINVEST Grant Expiration	(132,224)
CAMI Grant	<u>428,041</u>
Significant Revenue Changes	\$(857,663)

Expenditures

Increased computer upgrades	\$120,916
Reduced Video Poker pass-through	(760,470)
Reduce Forfeiture carryover	(245,566)
CAMI Program	428,041
Anti Drug Program	(147,444)
FINVEST Program	<u>(132,224)</u>
Significant Expenditure Changes	\$(736,747)

Add Packages Requested

1. Add DA Investigator to replace one cut by the Sheriff in 1994-95.

Department Rank = 1
Cost = \$51,233

The usual question surrounding discussions about investigators in a prosecutor's office is "what does a DA Investigator do that the police do not do?"

The answer is not complex but it requires an appreciation of the transformation that the investigative process makes as a criminal case passes from police to prosecutor. An arrest is occasioned by a finding on the part of the investigating officer that there is a probable cause to

believe that the suspect has committed a crime. The prosecutor's burden is heavier in that there must be evidence that shows "beyond a reasonable doubt" that the suspect is guilty.

In order to convict, the prosecutor must produce and present the evidence to a jury that proves the state has met this high standard. Meeting this standard means that witness statements must be checked and double-checked, documents need to be retrieved, organized and displayed, and alibi statements need to be verified. Although police detectives assist in this effort they are limited in the amount of time that can be invested in any particular case. Police agencies in this county have an excellent record in terms of overall support of the DA's Office, however caseload demands limit the latitude police supervisors are able to give in follow-up investigations.

This proposal is for a DA Investigator, supplies and telephone costs.

Budget Office Recommendation

With the loss of the Investigator in the 1994-95 budget process, the DA's Office is operating at a lower level than they have for many years. The City of Portland provides 3 Investigators and the DA's Office has 4.5 Investigators and 1 Investigator/Chief in the 1995-96 request. The Investigator provided by the Sheriff's Office was transferred to the City of Portland in July 1994. The District Attorney has requested an additional Investigator from the City of Portland, but has so far not been given that addition. I recommend approval of this requested add.

Issues and Opportunities

1. Continued Implementation of Ballot Measure 11

Upon the passage of Ballot Measure 11 in November 1994, the DA's Office, the juvenile and adult courts and the corrections organizations at the county and state levels underwent a period of intense analysis of how to implement the measure. This implementation, scheduled to begin on April 1, 1995 will continue into the 1995-96 budget year.

The most important, and complex, piece of this puzzle is the process which will be used to deal with this new element. Some of the questions being asked are, Where will the arraignments take place? Where will Deputy District Attorneys be physically located? Does that space have the resources, both physical in terms of desks, chairs and phones, as well as electronic connections to the adult and juvenile case tracking systems, legal research tools employed by the office and other electronic databases used in the course of prosecuting a crime?

2. Neighborhood DA

The Neighborhood DA program continues to excite the communities into which it is brought. For 1995-96 the DA's Office is exploring two opportunities: dealing with the creation of a community court and increasing the staffing complement of the Neighborhood DA by adding a mid county office.

The community court concept is being used quite effectively in midtown Manhattan. The goal of this public/private effort was to provide effective and accessible community based justice for low-level crimes. The goals of the Court are straightforward: make justice constructive, visible and efficient, and above all to make it responsive and meaningful to victims, defendants and the community.

The establishment of a Neighborhood DA in mid county would place the sixth DA in the field and result in one DA being located in each of the County's six service areas. Though the DA is not requesting this package for 1995-96, they will be working during the year with the neighborhoods, community groups and businesses in the area to bring a DA to the community by July 1996.

3. Increased Emphasis on Child Abuse

The receipt of the Child Abuse Multidisciplinary Intervention (CAMI) grant combined with the implementation of the Multidisciplinary Team (MDT) requires the office to pay close attention to the efficient and effective use of funds and other multi-agency resources of this endeavor.

As the MDT has become fully operational, it is clear that additional opportunities and challenges will arise. As the unit matures, the DA's Office is examining the feasibility of adding to the unit's portfolio by moving all sex abuse cases to the unit. Such a move requires the close cooperation of the law enforcement partners involved in the move. Such a move may require personnel to be reallocated and/or added to the overall staffing of the office.

4. Adequate Office Space

The District Attorney's Office developed a plan to renovate and fully use the eighth floor of the Courthouse for office space. Approximately one half of the renovation is complete. The issue facing the office now is how to complete the job.

In 1992, the District Attorney commissioned a space evaluation by a private consultant. The study, updated in August 1994, determined that it would be in the best long term interests of the District Attorney's Office and the county to begin refurbishing available space on the eighth floor of the county courthouse. Due to financial considerations, the project was broken down into four phases. The first two phases were funded by forfeiture

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March 16, 1995

monies and included space used by the drug unit, criminal history and some Unit D deputies, approximately 23 employees.

The final two phases of the project will add space for 46 employees but funds will need to be identified in order to be completed. Some portions of the project are being completed using Victim's Assistance Penalty Assessment Grant funds and general funds from the DA's office.

Estimates of costs for the final two phases are \$519,000 for phase 3 and \$757,583 for phase 4.

5. Continuation of Programs

With the 1995-96 budget, the funding of two grants ends. On June 30, 1995 the Byrne Anti-Drug grant will expire. In February 1996 the Financial Investigations (FINVEST) grant will expire. These two grants employ two deputy district attorneys and one financial investigator.

The FINVEST grant has been awarded to the District Attorney's Office since September 30, 1989. The Bureau of Justice Assistance grant funded the investigation and prosecutorial efforts of high level drug traffickers in Multnomah County. The employees are stationed at ROCN. The DA's Office was informed earlier this year that the grant would be closed out during the 1995-96 fiscal year. The DA's Office will know later this year if a replacement grant or additional opportunities will be available for this important function.

The Edward Byrne Anti-Drug Grant ends on June 30, 1995. It is awarded through the State Criminal Justice Services Division. It paid for a deputy district attorney and the ROCN director. Like the FINVEST grant, it focused its efforts on high level drug operations including selling, distributing and manufacturing. At this time, the DA's Office does not know of any additional funding for this program.

cc: Beverly Stein, County Chair
Mike Schrunk, District Attorney
Bill Farver, Chair's Executive Assistant
Kelly Bacon, DA Executive Assistant
Tom Simpson, DA's Office
Meganne Steele, Staff Assistant
Dave Warren, Budget & Quality Office



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TO: Barry Crook, Budget & Quality Manager

FROM: Keri Hardwick, DES Budget Analyst

DATE: April 17, 1995

SUBJECT: Department of Environmental Services Budget Request

The Department of Environmental Services is comprised of the following divisions:

- Department Administration
- Land Use Planning
- Facilities & Property Management
- Animal Control
- Fleet, Records, Electronics and Distribution Services (FREDS)
- Transportation
- Elections
- Assessment & Taxation
- Information Services

The requested budget represents current service levels. Decreases due to annexation in Transportation and increases to meet expected service levels in Facilities, resulted in a net decrease of 1.84 FTE. The budget is \$169 below constraint. No programs or major activities were cut to make constraint. Salary savings were conservatively budgeted where appropriate.

Budget Overview

	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	
		<u>Estimate</u>	<u>Budget</u>	<u>Budget</u>	<u>Difference</u>
Staffing FTE	593.23	592.34	592.34	590.50	(1.84)
Departmental Costs	\$100,575,772	\$111,904,000	\$158,257,282	\$144,159,041	(\$14,098,241)
Program Revenues	TBD	TBD	\$150,455,224	\$137,683,514	(\$12,771,710)
General Fund Support	\$14,593,203	\$20,630,271	\$15,231,911	\$13,110,543	(\$2,121,368)

Significant Changes

1. Changes in Capital projects:
 - Decrease in carryover revenue/expenditures in Lease/Purchase and Library Bond funds due to further completion of projects (\$16,926,000)
 - Decrease in Facilities CIP expenditures due to decrease in available funds (\$1,734,063)
 - Decrease in General Fund transfer to CIP Fund due to change in carryover, elimination of one time only project (\$2,210,232)
 - Normal fluctuation in carryover/planned projects in the Road Fund:
 - Roads: Increase \$2,993,631
 - Bridges: Decrease \$757,319
2. Responsibilities for producing the Multnomah County Fair were transferred to the Friends of the Multnomah County Fair, Inc. during FY 1994-95. This results in reduced revenue and expenditures of \$207,000.
3. Service Reimbursements to the Facilities Fund are increased approximately \$1,400,000. The expenditure increases were reviewed and approved by both the Facilities Advisory Staff team and the Facilities Client Committee. The increases will be in four major areas:
 - Personnel: There is a net gain of 5.50 FTE, with a corresponding addition of \$350,000 in Personal Services. It is important to note several things about this increase:
 - 3.00 FTE Custodians were eliminated, through attrition, due to the policy shift to contracting custodians.
 - 4.50 FTE in Fac. Maintenance are to provide services at the acceptable to County programs in our increasing number of facilities, and would have to be provided by temporaries or contractors if we did not add employees. Employees are less costly and provide a more consistent level of service.
 - 1.00 FTE is for the Energy Mgmt program begun in FY 1994-95, and is funded by energy savings and rebates.
 - 2.00 FTE are to provide the ability to adequately manage a 19 million dollar fund and keep track of the space usage of over 900 accounts in over 100 properties.
 - 1.00 FTE is to be shared clerical support for Property Management and CIP Administration.
 - Rentals are up a net \$634,705 - the new Commonwealth building lease is \$913,155.
 - Custodial contracts are estimated to be approximately \$400,000 higher due to rebidding contracts, and implementing the "living wage" policy adopted by the Board of County Commissioners. Costs are also higher in Professional Services because the County has changed from employee-provided custodial services to contracted services, however, the actual cost of providing the service is lower
 - Supplies for Maintenance are increased corresponding to the increased volume of work.
4. Transportation has transferred 7 employees (\$327,368) to the City of Portland due to annexations.
5. ISD reduced 3 FTE in Applications Development, through attrition, to create more flexibility in allocating new development funds.

Items for Discussion: (Issues/Adds)

Information Only Issue

1. Transfer of Parks & Expo to Metro.

Although this issue has no implications for the 1995-96 budget, it will be a major focus of effort for 1995-96. Depending on the outcome of negotiations, there could be major implications for the 1996-97 budget.

Countywide Issues/Add Packages

1. Information Systems.

There is no question that the County's information systems are critical to the way we intend to do business. We cannot choose to delay or deny the future - we must make ready for it! Over 4 million dollars in requests were submitted to the DPMC for funding in 1995-96 and the current allocation is \$688,000. Clearly, there is a large gap! At the same time, we are in the midst of an extensive information systems strategic planning process that is re-defining the way the County does business. We are all in a difficult position of having to make interim decisions towards meeting our needs, while taking into account the work done thus far on the strategic plan. There are several areas of the budget for which these decisions need to be made:

- ISD's budget: The 1995-96 budget request reflects current policies and service levels. If necessary, based upon the work of SPIT and any subsequent actions by the Chair and Board, we can modify the budget during the year, or work within the existing budget to manage changed priorities.
- "New Development" general fund special appropriation: Historically, all funds available have gone to those individual programs that could make the most compelling case for their unique needs. As we can see from Attachment A, which shows the DPMC's recommendations for the constraint money in 1995-96, we are beginning to see a shift towards county-wide priorities.

The two add packages approved by DPMC further this shift in thinking. Add Package MULT 2A requests \$522,200 for development of the County's PC based infrastructure; Add Package MULT 2B requests \$200,000 to expand efforts begun within the constraint allocation.

- Add Packages from Other Departments: All departments were invited to submit requests for new development to the DPMC, and, as mentioned, over \$4 million in requests were received. Requests which were not funded, as well as requests which were not submitted, may surface as departmental add packages.

2. Facilities.

There are two major issues with respect to the County's facilities: long term strategic goals and immediate needs.

- Long Term Needs

The Strategic Space Planning study has demonstrated our true ten year need, including seismic, growth in most programs and the needs of our current inventory - but excluding jail facilities and library branch needs - is \$250 - 300 million. An in-depth discussion of this issue will take place March 7, 1995.

- Immediate Needs

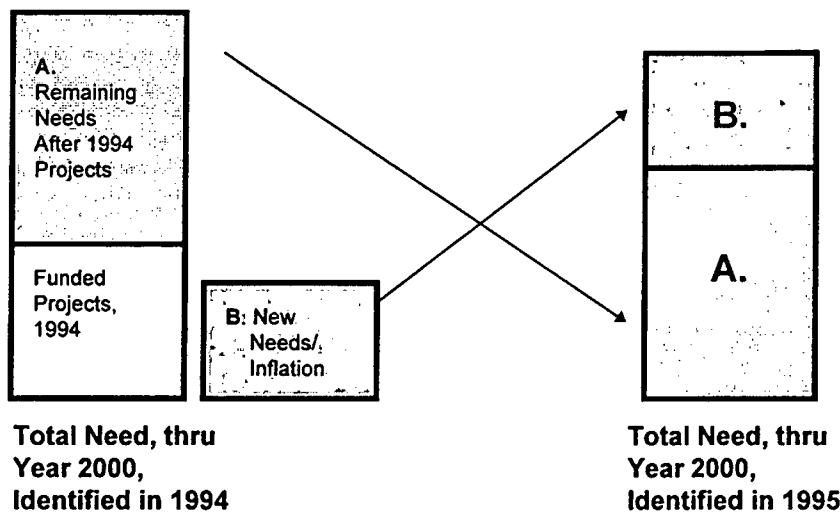
Years of deferred maintenance have left the County's facilities in serious need. The five year Capital Improvement Plan created in 1994 identified over \$18 million in Statutory/Mandatory, Essential/Safety/Security, and Major Maintenance needs. At that time, the projected cost for FY 1995-96 for these projects was \$3,362,000 (excluding CIP Administration costs - currently budgeted at \$525,000). Due to extreme inflation in the Portland metro area for construction projects (15-20%), and further identification of necessary projects, this figure has now grown to approximately \$6.2 million. There is \$1.4 million available within the current constraint budget. This leaves an unfunded need of approximately \$4.8 million, if we are even to stay on track with our CIP. This still does not include any funding for increasing corrections facilities capacity or seismic compliance.

It is clear that our historic course of low priority, cash financing of our maintenance needs just doesn't work. Betsy Williams and Dave Boyer have begun investigations about debt financing some of our deferred maintenance needs, and given current inflation in construction, it seems to make sense in some areas.

During recent budget processes, including this one, funding for necessary capital investment in our facilities has been funded at the margins. That is, the amount of funding has been dependent on "extra" money. We need to recognize that maintenance and upkeep of our facilities is a necessary cost of running every program - not an add-on that can, or should, be funded as a separate item.

We have created the Facilities Fund as the first step in identifying our true facilities costs. However, the amounts charged to each program still do not include a built-in amount to go towards the major maintenance needs of our facilities - a depreciation figure, of sorts. The department managers, as the FCC, have agreed to a continuation of the \$750,000 CIP "Surcharge" from the 94-95 budget. This is, however, a completely arbitrary figure - the correct amount is unknown at this time.

We therefore find ourselves with a two-tiered problem: prior practices have created an enormous backlog of need; current funding levels only make small dents in that backlog, and each year it grows because of the lack of a long-term strategy. The picture below illustrates this problem graphically. Note that the size (both relative and absolute) of the bars are just for illustrative purposes of how the problem develops - they are not indicative of the actual magnitudes.



This picture illustrates that, even if we fund the CIP each year for five years to try to eliminate the backlog, if we do not take action to also fund our current needs and inflation, the total need drops insignificantly, or not at all. If we then do not even fund the amount called for by the CIP, the problem is exacerbated.

Budget Office Recommendations.

The magnitude of the County's un- and under-funded infrastructure investment is often staggering. The simple fact is that we have understated and deferred the true costs of doing business for years, and now those decisions have caught up with us. Further delays only increase the eventual costs of necessary actions. We must make substantial contributions to both information systems and facilities, both to get ourselves out of the "hole" created by past practices and to sufficiently fund these programs in the long term.

Information Systems:

- I recommend considering all new funding requests related to information services, including the two add packages discussed here, as a group in one of the "non-specific work sessions" scheduled for the end of the month. It is important to consider them together to maximize our General Fund investments next year, and to begin to further the goals developed thus far in the strategic planning process.
- I recommend accepting the DPMC's allocation of the constraint "new development" funds, because it is the current County practice for allocating these funds. The SPIT committee is committed to developing a process for future years which more fully includes the County's strategic direction.
- I recommend at least funding the two add packages approved by DPMC. The Chair should consider allocating more money towards infrastructure development. The point that is made apparent again and again as we review practices in other companies is that we have to get the physical infrastructure in place before we can take advantage of efficiency, productivity and communication gains that new technology makes possible. This is a critical piece of meeting many of our county-wide goals and our lowest estimate of the need is approximately \$2 million. The constraint and add package funding total \$750,000.
- I do not recommend adding funds for implementing the Strategic Plan at this time. Once the plan is completed, if funding is necessary for implementation and is unavailable, a contingency request should be approved.

Facilities:

- **Most important:** Make a long term commitment and choose a long term strategy regarding County facilities. Determine the desired level of on-going General Fund support that will be used to create a stable level of funding so we can effectively manage our CIP program. Inconsistent funding levels and lack of a chosen strategic direction do not allow us to best utilize staff and contractors.
- A priority for Facilities Management and the Facilities Client Committee should be to address how future costs in the CIP categories will be funded in order to adequately protect our County assets.
- Take **bold action** towards meeting the 4.8 million dollar deficit in the current year of the CIP.
 - Recognize that the \$500,000 cut in CIP funding at the end of last year's budget process resulted in a 20% increase in the cost of the projects that were postponed.
 - The "set aside" for Data Processing and Facilities infrastructure is \$1.5 million. The DP projects above total \$722,000, which leaves \$778,000 for Facilities. This is simply not sufficient.

A sufficient level of funding will mean making hard choices about funding programs or capital needs. We must be willing to make those hard choices in order to protect the taxpayers' investments in our facilities. Lower spending levels only postpone and increase the magnitude of our needs. I recommend examining every other use of one time only funding available against using it for our facilities.

We have funded new programs in past years based on the assumption that we could "afford" it based on projected revenue streams. Simultaneously, we ignored the true costs of existing programs and of those new one that were added. It is time to take a serious look at what programs we truly can "afford." This may mean acknowledging that we can not afford to continue programs because the resources were not truly available to begin them.

- Examine the use of short-term debt financing to maximize use of funds that are made available.
- Examine the use of G.O. bonds to fund the out years of the CIP and for seismic work, in conjunction with any bond issues that may be a result of the Strategic Space Plan. It appears unlikely that available General Fund dollars will ever be sufficient to adequately fund the CIP without major program cuts.
- Add \$25,000 to DES Department Administration for consultant assistance to develop a community education program for our Strategic Space Plan.

DES Add Packages

Revenue Neutral

1. Animal Control Service Enhancement and Telephone Upgrades (DES #1 & DES #2 - Total \$105,000)

Animal Control projects \$164,500 in additional revenue without a fee increase, and if the fee increases included in the Add Package and increased collections due to the Add Package are added, the total increased General Fund revenue from Animal Control is \$230,000. These two add packages are the result of the study done by Commissioner Collier's Office and cost a total of \$105,000. I recommend funding these add packages because of the projected service and customer satisfaction increases, combined with the fact that Animal Control is bringing in the revenue to cover their costs.

2. Land Use Planning Records (DES #3 - \$26,000)

Revenues are projected to increase \$26,907 due to proposed fee increases. Creating a permanent record of Land Use Planning documents will result in both operational efficiencies and improved customer service. Although the fee increases will be implemented regardless of add package funding, I recommend that Land Use Planning be allowed to fund this add package with the fee increase.

On-Going Requests - Funding Recommended

1. Education & Training (DES #4 - \$40,000)

It is a Performance Measure for the County and a clearly stated priority of the Chair that Education and Training be increased County wide. This add package clearly supports those goals. There is some debate as to whether training should be funded in a centralized place, or at the department level. While centralized training coordination and planning would be of invaluable benefit to the County programs, "one size fits all" training classes/programs do not seem to be the best approach to actually provide the training needed. The departments can more clearly define the specific needs of their employees, based on the variety of jobs and skills found throughout the County. DES has prepared an extensive, detailed Training Plan. I recommend funding this add package to further that plan.

2. Archivist (DES #5 - \$39,210, \$34,720 on-going)

As discussed in the Records Management program narrative, the volume of Records Management activities has grown significantly in recent years, and continues to grow rapidly. In addition to programs' current records needs, the County has vast stores of historical data that many people would like better access to. Maintenance of and access to public records is a critical function of government. However, our current Records staff can only provide the current services needed by our County programs. Funding this add package would allow better public service, as well as service to other County programs. I recommend funding.

Funding Recommendation Depends on Policy Decision

1. Water Quality (DES #6 - \$65,000)

The County needs to make a decision on the level of involvement it wants to have in the Johnson Creek watershed. The other Water Quality programs in which the County is involved are the result of federal mandates. It is likely that if no action is taken, Johnson Creek will also be the subject of mandates. A coalition of governments and private parties has decided to take a pro-active approach to management of the Johnson Creek watershed.

It is in the County's interest to have our position represented on this committee, and without any funding, our employees (since they are budgeted in the Road Fund) will not be able to participate. Also, we have championed the idea of partnerships between governments, and between government and citizen/private groups, so it seems we should not only ask others to be our partners, but be willing to become a partner when asked, as well. We can not determine whether taking a pro-active approach will be less costly in the long run than waiting for mandates, but we can take actions that the involved parties believe are best, rather than being forced to take actions determined by the Federal government. Also, citizens affected by flooding of Johnson Creek should see this as a positive action by the County.

However, as stated in the Add Package, it is unclear what the ultimate role, and legal authority for, the government partners is. We must be careful not to make unconditional commitments, which we may later regret. This add package requests funding for some small scale projects, as well as our participation in the planning process. It may be in our best interests to fund only the planning portion, at a cost of \$21,850. The Chair and Board may also decide that they do not want the County in the watershed management business, unless participation is mandated. If we take this position, we will have to live with the consequences of those mandates, and will not have future opportunity to determine the direction of actions on the creek.

Recommend making the policy decision as to what our involvement will be, then determining how best to meet that goal. If the decision is made to be involved in this project, I recommend only funding the planning work.

2. Feral Cat Program. (DES #8 - \$15,000)

Compelling arguments can be made for and against funding this pilot project. One fact is certain - Multnomah County has an increasing feral cat problem. David Flagler, Animal Control Director, believes feral cats will be a top problem for Animal Control in the coming years. It also seems clear that our current policy of renting live traps to citizens and then euthanizing the cats caught does not control the problem. The cost of the add package is relatively low, and would also be covered by Animal Control's increased revenue.

This program is certainly innovative and "cutting edge" - qualities of the kind of thinking which we have challenged our managers to do. It also will seem ridiculous and wasteful to some citizens. The cost is relatively low, and Animal Control believes they could run a successful pilot project. It is an untested idea, and may not work, in which case we would be where we are now in terms of solving the problem. If, however, it does work, we will be able to make great inroads into solving our problem.

The decision the Chair and Board must make is whether is worth risking public ridicule and \$15,000 to try a new idea to solve a problem we don't have another good solution for. If so, fund the add package.

Recommend Against Funding

1. Animal Damage Control (DES #7 - \$10,000)

This add package is to give the State money to perform a function they are already charged with providing. They are just not performing it well enough, and Animal Control receives calls when they don't. I recommend against funding because by doing so, we set two precedents - first, we get into the wildlife management business, which is a highly controversial area clearly not in line with the stated County mission; second, we would be giving the State funds to perform services they are required to provide. In light of cutbacks in State funding to local governments, it seems especially critical that we do not give incentive for them to ask us for funding for the services they say they are going to continue to provide.

cc:

Beverly Stein, Multnomah County Chair
Bill Farver, Executive Assistant
Meganne Steele, Staff Assistant
Betsy Williams, DES Director
Mike Oswald, DES Management Assistant

Janice Druian, Assessment & Taxation
Vicki Ervin, Elections
David Flagler, Animal Control
F. Wayne George, Facilities & Property Management
Tom Guiney, FREDS
Jim Munz, ISD
Larry Nicholas, Transportation
R. Scott Pemble, Land Use Planning



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To; Barry Crook

Health

Constraint

Health's constraint \$26,432,000. (attachment 3) They are \$260,000 over.

The Health constraint was increased (\$125,000) to annualize McCoy Building rent. It also included \$135,000 for COP debt service for North Portland. Neither of these items is included but the funds were absorbed into the budget. Building management is underbudgeted by \$260,000. Offsetting cuts must be identified.

<u>Budget Trends</u>	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	<u>Difference</u>
Staffing FTE	683.03	682.00	770.65	800.93	30.28
Personal Services	\$35,625,124	\$40,178,281	\$39,848,457	\$43,267,154	\$3,418,697
Contractual Services	11,943,000	27,946,061	51,112,174	48,127,663	40,000
Materials & Supplies	12,758,393	15,426,006	20,686,803	20,757,258	(125,948)
Capital Outlay	<u>247,616</u>	<u>492,187</u>	<u>473,439</u>	<u>280,882</u>	0
Total Costs	\$60,574,133	\$84,042,535	\$112,120,873	\$112,432,957	\$3,332,749
Program Revenues	\$29,941,813	\$57,289,948	\$84,670,104	\$83,830,944	(\$839,160)
General Fund Support	\$30,632,321	\$26,752,587	\$27,450,749	\$28,602,013	\$1,151,264

Significant Changes

HIV \$900,000 of increased Ryan White grant funding in HIV Block Grant,
3.5 FTE \$677,000 sub contracted
\$300,000 of Ryan White and \$256,000 of NOAH grant added to HIV
clinic 2.54 FTE

2.8 FTE are added to Planning&Development \$185,000

Spec Care 1 new school based clinic located in an elementary school is added with new grant funds 3.8 FTE

REEP program discontinued and folded into OHP

3.9 Nurse FTE are cut from the Field \$232,000

Primary Care Breast&Cervical Cancer grant added \$570,000

Homeless Children program identified as La Clinica De Buena Salud

HealthSource referral funds increased by \$63,000

Dental Two new dental clinics are included funded with OHP medicaid.
13.42 FTE

2.2 FTE are added to Outreach and Education (General Funds)

Service&Support 3 FTE are added to information and referral (General Funds)

1.6 FTE are added to Training

Outside lab budget is reduced by \$145,000 and decentralized

Corrections 3.9 fewer nurses are included

ISSUES

(1): CareOregon How much distribution of revenue remaining in the Specialty, Ancillary, and Hospital accounts after expenses (capitations and specialty and ancillary bills) is included?

CareOregon is realizing savings; i. e. total costs per client are less than the total capitation paid by OMAP. CareOregon receives Medicaid funds from the State and pays for clients health care. Any money left after health care capitations, specialty, and ancillary expenses have been paid will be distributed to the partners; i.e. Multnomah County and OHSU, according to the contract between the partners. The funds remain in the CareOregon Fund until distributed to the partners. The CareOregon Citizen Advisory Board meets monthly to consider CareOregon matters. The CareOregon Fund is a County Fund, distributions of funds remaining in the Ancillary, Specialty, and Hospital risk pools after medical capitation, specialty, and ancillary bills have been paid are included in County budget appropriations.

The Health Department has included an amount in the order of \$1,700,000 of income distribution as part of their medicaid revenue in next years Primary Care budget.. Has CareOregon included in its budget an amount for distribution?. If so, what is the basis of the estimate. It is difficult to tell what the actual difference between revenue and expenses is because the fund accrues expenses based on estimated liabilities rather than

cash payments. By working with claims paid by month of service data and adjusting for lags; I estimated distribution." I estimate that the amount Multnomah County could receive in addition to primary care capitation and payment for ancillary and specialty care for activity during 95/96 might be as much as \$1,000,000.

I understand that Health has assumed that it will meet its target for General Fund savings for 94/95 because it will receive about \$1,000,000 of pool distribution from CareOregon for activity prior to July 1, 1995.. We need to know how much is assumed to be distributed to Health Primary Care in both years and how the advisory CareOregon Board fits in the process.

The Governor's budget provides for inflationary increases in the OHP but also has cut targets. One method of achieving cuts is to change the way eligibility is determined. Instead of providing information on 1 month, enrollees must establish eligibility over 6 months. Also enrollees are proposed to be required to pay premiums (\$5 per month per person) and co-pay amounts. Covered services will move from line 606 to 581 in the list of provided services. The effect of these changes is not yet known.

(2) Estimated 95/96 Medicaid revenue for the Primary Care Clinics
We probably aren't going to get as much medicaid revenue as is budgeted.

I used the model I have used for the CareOregon quarterly reports as the basis for estimating next year's Medicaid revenue available for Primary Care in the Health Department. (attachment 1) Health's budget includes \$1,600,000 more than my estimate indicates.. In the first and second quarterly CareOregon reports significant shortfalls in capitation revenue were found. These shortfalls were offset by the Medicaid settlement payment from last year and greater than expected FQHC fee for service revenue. Unlike the first quarter; the second quarter does show a significant drop in FQHC fee for service visits. Also my CareOregon analysis assumes that the medicaid "settlement" payment OMAP will pay for 94/95 will be accrued to this year. This is different from last year. The medicaid settlement from 93/94 is being recognized in 94/95. In effect it is taking the settlement checks from 93/94 (\$1,700,000) and from 94/95 (\$750,000) to provide the level of Medicaid revenue budgeted in the Primary care budget..

Next year we won't have the "settlement" cushion to make up for shortfalls. Unless the Primary Care clinics shift uncovered clients to the enrolled group so that the number of enrollees grows faster than it has averaged over the last five months I don't see that we will get more than 10.5 million in medicaid.

Health's 94/95 budget has \$8,125,000 of medicaid revenue and the request includes \$12,000,000 of medicaid for 95/96

I recommend that the third quarter CareOregon Report be carefully reviewed to see if enrollment levels rise in response to the recent enrollment effort and if fee for service visit levels continue to decline. At that time budgeted medicaid revenue for 95/96 should be reviewed and possibly adjusted.

(3) Collecting for Specialty Care Provided in Multco Primary Care Clinics and SB 760 cases. Primary care probably isn't collecting all the money to which it's entitled.

One reason Health's estimate of capitation revenue is higher than mine is that Health assumes \$7.50 PMPM for ancillary and specialty care. Actual experience indicates \$4.00. It is probable that we are not collecting for all specialty services delivered such as OB/GYN, podiatry, dermatology. Also data from the Health Data Office indicates that clients enrolled in other OHP Plans do sometimes use our clinics. Some of these are SB760 cases (CD or STD areas of public health concern where enrollees can come to county clinics and we can bill other plans.).

I recommend putting resources into checking the system and ensuring we are capturing and billing for billable events.

(4) REEP The REEP program will be absorbed into the Oregon Health Plan.. The problem really seems to be an adverse selection issue where the County is opting to keep a relatively expensive group of clients.

The REEP program is scheduled to fold into the Oregon Health Plan in April. OMAP is working on an Health to keep REEP clients on a fee for service basis rather than capitate them. REEP clients currently generate .about 1 visit per month per client. This would produce about \$1,200,000 of fee revenue, about half what is realized under the present REEP program. I understand that the agreement with OMAP includes the provision that refugees will be treated differently than other OHP enrollees. Refugees will not have the option of choosing a plan but will be assigned to the International Health Clinic until that Clinic decides that they are ready to make a choice. Multnomah County Health, because it screens refugees for public health reasons and because it provides a high level of translation services; may be the clinic of choice for refugees anyway My revenue estimates assumes we keep our present level of refugee clients. Health's estimate of REEP revenue (\$910,000 IHC plus \$434,000 dental) is higher than mine. Part of the difference may be due to anticipated changes in primary practice in order to generate more visits and thus more revenue

REEP clients because they often have untreated health problems and need translation services. are relatively expensive Because this is an adverse selection issue a longer term solution may be to provide supporting data and ask OMAP for a capitation rate for designed to cover the cost of treating refugees.

(5) Health Alcohol/Drug

The issue with the capitation of alcohol and drug services and the inclusion of alcohol and drug services in covered capitated services is that CareOregon is required to provide these services to its enrollees. If it doesn't arrange with the County's A&D

program it will have to manage its own A&D contracts. If the cap for A&D services which is paid to CareOregon by OMAP does not cover the cost of A&D services, and the difference is absorbed by A&D with General Funds then General Funds are subsidizing the Oregon Health Plan. As I understand it, the cap rate is not settled yet.

(6) School Based Clinic: Expansion of the provision of Medicaid Match with local tax dollars

The School based clinic revenue includes \$300,000 of Medicaid fees, an increase of \$250,000. Part of this (\$100,000) results from leveraging local tax dollars by paying them to the State and the State using the funds as match for Medicaid. Currently \$119,000 is included for Babies First in Field Services, \$22,000 is included for HIV case Management. and \$229,000 match is in Information&Referral for Safenet. This results in more service and more Federal dollars used in Multnomah County. However I think there is a problem. Medicaid is generally speaking an entitlement program funded with Federal dollars and State match. The State match comes from income tax collected State wide. This is the appropriate funding source for transfer payments intended to move resources from the relatively affluent to the poor.

Multnomah County is a relatively poor county. Per capita income in Washington and Clackamas Counties is higher. This is a typical pattern in urban areas. When Medicaid match is provided with Multnomah County tax dollars, then relatively affluent people in Washington and Clackamas escape paying part of the costs of social services. Multnomah County has a greater than expected share of persons needing assistance. Therefore when the County tries to assume the burden for social services it gets hit two ways; less money /more demand. Politically, to the extent the Board of County Commissioners tries to make up for State underfunding they will be the target for advocacy groups rather than State legislators.

ADD PACKAGES

1 Nurse Positions/ONA wage settlement

Part of the ONA contract agreement calls for restructuring of the steps as of July 1 95. The effect is the same as an extra COLA. In addition to the 2.8% CPI driven COLA budgeted for other employees the nurses receive an additional raise. I have costed out the step changes (Attachment 2). The cost of the step changes is \$344,000. As attachment 2 explains only \$182,000 of this is attributable to General Fund supported nurses, the rest being for grant funded nurses.

There are 7 fewer nursing FTE in the budget request. The cut positions are in the Field services area (3.9 FTE), Corrections(4 FTE), Linkage (2FTE). HIV (1FTE), and STD (1 FTE). .3.8 nursing FTE have been added in the new School based clinics plus 1 FTE to annualize mid year adds. . Therefore not funding the positions in Field and

Corrections decreases service level. However service is increased in School based clinics partially with Medicaid (\$300,000) which is fee money essentially like other General Funds.

I recommend that \$182,000 be added to Health's budget to cover extra step costs associated with General Fund supported nurses because the contract with its higher costs was agreed to by the Board.

2 Postponing Sexual Involvement \$346,000

This package would expand on a program currently funded by the Multnomah Commission on Children&Families. The curriculum is now being taught in 4 Portland Public Schools. The expansion would offer the curriculum to all Portland Public School 6th graders.

Recommendation: Yes Because Health Care Professionals are convinced that prevention efforts directed at primary grade children is the effective method of reducing teen pregnancy, an urgent benchmark, they recommend funding this program even if primary acute care must be cut later this year. A five year impact evaluation showed a 1/3 reduction in pregnancies in 12 graders attributed to this program. If this success were experienced in Multnomah County, it would be cost effective.

3 Two New School Based Clinics \$600,000 annual, \$430,000 95/96

Package adds funds for a clinic at Franklin High and another clinic in an east county site. The current 10 clinics average \$226,000 annually so the cost of the new ones is higher than the current ones.

Recommendation: No The request already includes \$550,000 more in the School Based Clinic program and a higher priority was given to the less traditional approach of the Postponing Sexual Involvement program.

4. Pharmacists in Correctional Facilities \$450,000

The Pharmacy Board proposed rule changes have been under consideration for 9 months and may be under consideration for 9 more according to the Pharmacy Board. The rule in question states "prescription drugs shall be dispensed by a pharmacist or a practitioner authorized to dispense in either an individual container, medication card, or in a unit dose system." The Pharmacy Board states that practitioner includes nurse practitioner. The point is that the rule isn't passed and even if it were it is not clear that it means we must have pharmacist employed in jails.

Recommendation Do not fund until it is determined what changes will be required..

ATTACHMENT 1

To Tom Fronk

From: Kathy Innes

Subject: Estimated 95/96 medicaid revenue

	Rev Code	Health Estimate	Low Budget Estimate	High Budget Estimate
CareOregon/Cap	6699	2,966,790	2,578,415	2,578,415
DCO/Cap	2600	3,072,000	3,428,040	3,428,040
FQHC/FFS	2603	2,250,177	1,719,000	1,905,600
IHC/FFS		1,444,500	949,500	1,139,400
		9,733,467	8,674,955	9,051,455
CareOregon Profit Distribution				
For 2/94 - 6/95			0	0
For 7/95 - 6/96		1,710,000	800,000	800,000
Outstationing		563,000	560,000	560,000
		12,006,467	10,034,955	10,411,455

The above table compares Health's estimate of Medicaid revenue with the Budget Office estimates. Even with \$800,000 of profit distribution from CareOregon I estimate about \$1,600,000 less in medicaid than you. I project 286,000 CareOregon enrollee months for 95/96. There will be 290,000 patient months through June 94 if CareOregon continues to grow at the rate actually experienced for the last 5 months. Experience to date coupled with estimates of payments that will be made to OHSU when denied claims are reprocessed leads to an estimate of \$10.50/patient month in savings or profit. Profit in 95/96 will be reduced by the Alcohol&Drug payments to CFS in excess of the PMPM paid by OMAP. (\$1.50 pmpm?).

Attached are the computer models I used.

I assumed that Multnomah County adds 300 enrollees per month during all of 95/96 even though the current growth rate has decreased (over last 6 months it has been . . .

200/month). The new eligibles; i. e. foster kids, disabled may result in higher growth... The point is I have assumed strong growth given current actuals. I have also assumed 300/month increase in DCO enrollees during all of 95/96. Although Health has stepped up efforts to get current uncovered clients signed up, results are inconclusive so far.

Also included a 10% increase in the capitation (PMPM) because the Governor's budget includes this much inflation.

Ancillary and Specialty are assumed at the rate of actual experience through 12/94 plus an estimated addition due to the recent change in treatment of maternity claims processing plus 10% inflation. All this results in \$4.40 PMPM.

On the other hand the Governor's budget also assumes cuts in the OHP. For example \$22.455 million in savings due to eligibility changes. People will have to provide evidence of meeting the income test for 6 instead of only one month.. They will have to establish that their average income over 6 months is at or below poverty. What effect this will have on continued enrollment is highly speculative.

Fee for service visits are currently running at 2,000/ month; 2/3rd's pre OHP levels. Continued decrease is the expected result of continued growth in capitated clients in the area.

In the higher estimate, I assumed an increase in the current visit rate for IHC clients.

CareOregon Fund

For the CareOregon Fund I estimate an average 23,800 enrollees which results from continuing their present growth rate of 400 per month through 95/96. This results in 286,000 enrollee months. At 110 PMPM this results in \$31,460,000 rather than the \$48,000,000 budgeted.

95'96

ATTACHMENT 1

MULTNOMAH COUNTY PRIMARY CARE CLINICS

ESTIMATED ACTUAL MEDICAID REVENUE COMPARED TO BUDGET 95/96

		0.3	111	100	14.157	333	21.56	21.56						ANNUAL		
		July 94	August	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Est	Actual	
NUMBER OF CAPITATED CLIENTS																
Primary Care		10200	10500	10800	11100	11400	11700	11900	12100	12300	12500	12700	12900		11,675	
DCO		11600	11900	12200	12500	12800	13100	13400	13700	14000	14300	14600	14900		13,250	
NUMBER OF FEE FOR SER. Vislt																
IHC Visits		1600	1600	1600	1600	1600	1600	1400	1400	1400	1400	1400	1400		1,500	
		900	900	900	900	900	900	900	900	900	900	900	900			
Revenue																
Primary Care Capitate		144,401	148,649	152,896	157,143	161,390	165,637	168,468	171,300	174,131	176,963	179,794	182,625		\$1,983,396	
Primary Care Ancillary		43,320	44,595	45,869	47,143	48,417	49,691	50,540	51,390	52,239	53,089	53,938	54,788		\$595,019	
DCO Enrollees		250,096	256,564	263,032	269,500	275,968	282,436	288,904	295,372	301,840	308,308	314,776	321,244		\$3,428,040	
Fee For Service/FQHC		177,600	177,600	177,600	177,600	177,600	177,600	140,000	140,000	140,000	140,000	140,000	140,000		\$1,905,600	
Fee For Service/IHC		99,900	99,900	99,900	99,900	99,900	99,900	90,000	90,000	90,000	90,000	90,000	90,000		\$1,139,400	
TOTAL															\$9,051,454	

Attachment 2

To: Tom Fronk

2/23/95

From: Kathy Innes

Subject: Add Package. Cost of Extra steps estimated at \$344,000

Because the extra steps take effect for all nurses on the first day of the year, the effect is a 3.75% cola for Nurses in addition to the CPI determined cola (assumed to be 2.8% for purposes of budgeting.

Attached are two runs of the nurses cost model I used for figuring the settlement costs. Also is a copy of the "first condition run" to show where nurses were on the step structure as of July 1, 1994. All nurses who aren't at the top are advanced a step for 95/96. The difference between charts 2 and 3 is that chart two is based on the agreed upon revised step structure and a 2.8% cola while chart three is based on taking this years steps times 1.028 and not changing steps. The difference is the cost of the step changes; \$344,103.

Both models give an amount equal to 1.95% increase for steps for those eligible, but as you can see 43% of nurses are at the top step in both cases. Nurses retain their numeric step under the agreement but the hourly rate of each step changes. Also roll ups have been calculated at 21.2% of base as per the budget manual.

Example from chart 2

Base+Roll Ups 8th CHN step $\$21.64 \times 13.2 \text{ FTE} = 285.65 \times 2088 = 596,432 \times 1.212 = \$722,877$

Steps $\$722,877 \times .0195 = \$14,096$

Double check nurse base 7/1/94 9,770,000

$9.745 \times 1.056 \times 1.025 \times 1.028 =$	10.843
plus steps 95 (151,000)	10.994
x 3.75% increase(extra step July 1 95)	11,406
x roll ups 1.212	13,824
plus expected steps 96 (124,000)	13,948

This jives fairly well with the \$13,900 figure generated by the model.

Also only 23% of this cost is attributable to General Fund positions. The Federal State fund is 40% General Fund Transfer supported so 40% of the 77% is General Fund. This is 30.8%. Therefore of the 344,000 only 53.8% is due to General Fund supported positions. This is \$182,000.

CMMI

Steps on Anniver during 95/96 2.8% cola 7/1/95 NPs, CHNs, step added dropped LPN drop 1st step

	6315 CHN										FTE	Base+Roll	Steps
	16.73	17.35	18.00	18.68	19.38	20.11	20.86	21.64	22.45				
		0	4.06	1	7.6	12	12.8	13.2	58.75	109.41			
	0	0	184,940	47,273	372,735	610,698	675,705	722,877	3,337,777			5,952,005	
		0	3,606	922	7,268	11,909	13,176	14,096					50,977
CHN/SS	16.73	17.35	18.00	18.68	19.38	20.11	20.86	21.64	22.45				
		0	1.5	0	1	0	2	0.8	3	8.3			
	0	0	68,328	0	49,044	0	105,579	43,811	170,440			437,201	
	0	0	1,332	0	956	0	2,059	854					5,202
6314 NP	21.73	22.37	23.41	24.08	24.79	25.53	26.30	27.34	28.44				
		0	3.44	0	0.8	2.3	3.7	0.8	15.45	26.49			
	0	0	203,795	0	50,188	148,598	246,258	55,351	1,111,965			1,816,154	
		0	3,974	0	979	2,898	4,802	1,079					13,732
6319 NP/L	22.82	23.49	24.53	25.28	26.03	26.81	27.62	28.71	29.86				
		0	0	0	0	0	0	0	4.1	4.1			
	0	0	0	0	0	0	0	0	309,839			309,839	
6303 LCPN	11.78	12.33	12.85	13.38	13.92	14.45	14.98	15.51	0.00				0
		0	0.9	2	0	0	3.5	9.4	0	15.8			
	0	0	29,267	67,720	0	0	132,682	368,954	0			598,624	
	0	0	571	1,321	0	0	2,587	7,195					11,673
6318 CHN/L	17.57	18.22	18.90	19.61	20.35	21.12	21.90	22.72	23.57				
		0	0	0	0	1	1.9	3.8	15.5	22.2			
	0	0	0	0	0	53,436	105,315	218,506	924,635			1,301,892	
	0	0	0	0	0	1,042	2,054	4,261					7,357
6316 PA	21.73	22.37	23.41	24.08	24.79	25.53	26.30	27.34	28.44				
		0	0	0	0	0	0.5	1.7		2.2			
	0	0	0	0	0	0	33,278	0	122,352			155,630	
	0	0	0	0	0	0	649	0					649
6326 CNH/C	17.46	18.08	18.73	19.41	20.11	20.84	21.59	22.37	23.18				
		0.5	11.23	1.3	2	4.3	8.6	2.8	19.8	50.53			
	0	22,877	532,293	63,856	101,783	226,777	469,877	158,510	1,161,480			2,737,453	
	0	446	10,380	1,245	1,985	4,422	9,163	3,091					30,731
6317 NP/C	22.64	23.28	24.32	24.99	25.70	26.44	27.21	28.25	29.35				
		0	1.7	0	0	0.6	0	1.8	1	5.1			
	0	0	104,627	0	0	40,146	0	128,684	74,275			347,732	
	0	0	2,040	0	0	783	0	2,509					5,332
6320 CHN/L/C	18.33	18.98	19.67	20.38	21.12	21.88	22.67	23.49	24.34				
		0	0	0	0	0	0	2		2			
	0	0	0	0	0	0	0	118,883	0			118,883	
	0	0	0	0	0	0	0	2,318					2,318
								0.43	97.9	246.13	13,775,415	127,972	13,903,386

Steps on Anniver during 95/96 2.8% cola 7/1/95

	6315 CHN	6314 NP	6319 NP/L	6303 LCPN	6318 CHN/L	6316 PA	6328 CNH/C	6317 NP/C	6320 CHN/L/C	FTE	Base+Roll	Steps
	16.12	21.08	22.13	11.33	16.92	21.08	16.84	21.99	17.68			
	16.80	21.73	22.82	11.78	17.64	21.73	17.53	22.64	18.41			
	17.43	22.37	23.49	12.24	18.30	22.37	18.16	23.28	19.07			
	18.13	23.41	24.58	12.75	19.04	23.41	18.86	24.32	19.80			
	18.84	24.07	25.19	13.25	19.78	23.99	19.57	25.08	20.55			
	19.61	24.78	26.02	13.76	20.59	24.78	20.34	25.69	21.36			
	20.38	25.52	26.80	14.33	21.40	25.53	21.11	26.44	22.17			
	21.19	26.30	27.61	14.92	22.25	26.30	21.92	27.21	23.02			
	22.06	27.34	28.71	15.51	23.16	27.34	22.79	28.25	23.93			
	58.75	15.45	4.1	0	15.5	1.7	0	1	2			
	109.41	26.49	4.1	15.8	22.2	2.2	50.53	5.1	2			
	5,830,623	1,748,860	297,886	574,254	1,277,425	149,924	2,677,398	334,598	116,511			
	49,741	5,068	13,258	0	11,198	7,195	630	29,941	5,131			
	2,272											
	0.43	97.9	246.13	13,434,849	124,434	13,559,283						

Current Pay Rates Steps on Anniver during 94/95 no cola										FTE	Base+Roll Up	Steps		
6315 CHN	14.49	15.09	15.67	16.29	16.94	17.63	18.32	19.04	19.82	109.41	5,497,752	59,735		
		4.06	1	7.6	12	12.8	13.2	13.5	45.25					
		166,299	42,535	336,054	551,783	612,542	656,407	697,709	2,434,423					
CHN/SS	14.49	15.09	15.67	16.29	16.94	17.63	18.32	19.04	19.82	8.3	400,431	5,710		
		1.5	1	1	2	0.8	1	2						
	0	61,440	0	44,218	0	95,710	39,782	51,682	107,599					
6314 NP	18.3	18.95	19.53	20.11	21.03	21.64	22.27	22.94	23.63	26.49	1,601,845	16,415		
		3.44	0.8	2.3	3.7	0.8	3.6	11.85						
		176,948	0	43,669	131,293	217,337	48,360	224,166	760,074					
6319 NP/L	19.22	19.9	20.51	21.12	22.08	22.72	23.38	24.09	24.81	4.1	276,111	0		
	0	0	0	0	0	0	0	0	276,111					
	0	0	0	0	0	0	0	0						
6303 LCPN	10.19	10.59	11	11.45	11.91	12.37	12.88	13.4	13.94	15.8	543,803	7,874		
		0.9	2			3.5	4.7	1	3.7					
	0	25,871	59,717	0	0	117,520	164,319	36,373	140,003					
6318 CHN/L	15.21	15.84	16.45	17.1	17.79	18.51	19.24	19.99	20.81	22.2	1,215,525	7,731		
		0	0	0	1	1.9	3.8	1	14.5					
	0	0	0	0	48,289	95,463	198,455	54,261	819,057					
6316 PA	18.3	18.95	19.53	20.11	21.03	21.64	22.27	22.94	23.63	2.2	138,410	573		
		0	0	0	0	0.5	0	1.7						
	0	0	0	0	0	29,370	0	0	109,040					
6326 CNH/C	15.22	15.82	16.4	17.02	17.67	18.36	19.05	19.77	20.55	50.53	2,526,660	33,171		
	0.5	11.23	1.3	2	4.3	8.6	2.8	5	14.8					
	20,657	482,237	57,871	92,398	206,243	428,593	144,786	268,318	825,558					
6317 NP/C	19.21	19.86	20.44	21.02	21.94	22.55	23.18	23.85	24.54	5.1	305,370	5,955		
		1.7	0	0	0.6	1.8	1							
	0	91,644	0	0	35,732	0	113,256	64,738	0					
6320 CHN/L/C	15.94	16.57	17.18	17.83	18.52	19.24	19.97	20.72	21.54	2	108,413	2,114		
		0	0	0	0	0	2							
	0	0	0	0	0	0	108,413	0	0					
	0	0	0	0	0	0	2,114	0						
NA New Scale: Steps dropped and added all 4% apart; Jumps Added; No COLA									0.43	97.9	246.13	12,614,320	139,278	12,753,598

ATTACHMENT 3

95/96 Constraint 12/13/94

General Fund Adopted 94/95

PS	M&S	C	TRANS/FS	TRANS/INV	
5,771,388	1,286,691	12,750	22,950,946	164,651	30,186,426
			(4,447,460)		
			190,567		
			125,000		
			135,000		
			(93,400)		
81,125					
5,852,513	1,286,691	12,750	18,860,653	164,651	26,177,258

Gen.Fd Indirect

Annualize School Clinics

Annualize McCoy Bldg

North Portland Clinic Interest

Carryover Capital

Nurses 95 raise/GEN FD

26,012,607

60,000

Inmate Billing

126,000

Regulatory Health Fees

64,951

Teen Connections/CFS

127,732

Indirect Share

40,074

Service reimbursement

26,431,364

Adjusted Constraint

26,432,000

Request

Inverness Fund Adopted 94/95

1,070,542	563,681		164,651	1,783,638
				1,783,638 Request



MULTNOMAH COUNTY, OREGON

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN
DAN SALTZMAN
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BUDGET & QUALITY OFFICE
PORTLAND BUILDING
1120 S.W. FIFTH - ROOM 1400
P. O. BOX 14700
PORTLAND, OR 97214
PHONE (503)248-3883

TO: Barry Crook, Budget & Quality Manager
FROM: Chris Tebben, JJD Budget Analyst
DATE: March 13, 1995
SUBJECT: Juvenile Justice Budget Request, FY 95-96

The Juvenile Justice Division's (JJD) budget request has been reviewed by the Division Administration and the Budget & Quality Office. This memo outlines the major issues and decisions related to JJD's budget request to be reviewed with the Chair's Office prior to the BCC approving the budget.

Constraint

JJD's budget meets its constraint. The constraint was derived by taking last year's General Fund Support net of indirect costs, adding \$619,018 for annualized programs (Residential Sex Offender, Food Service and Diversion), adding the net increase in revenues that support the General Fund (\$50,587), and adding the General Fund support for indirect costs (\$66,624). Based on this calculation, the constraint is \$13,212,039.

Budget Summary:

	1993-94 <u>Actual</u>	1994-95 <u>Current Estimate</u>	1994-95 <u>Adopted Budget</u>	1995-96 <u>Proposed Budget</u>	<u>Difference</u>
Staffing FTE	176.6	204.72	198.94	202.8	3.86
Total Costs	TBD	TBD	\$16,675,389	\$17,002,617	\$327,228
Program Revenues	TBD	TBD	\$5,013,734	\$4,721,319	(\$292,415)
General Fund Support	TBD	TBD	\$11,661,655	\$12,281,298	\$619,643

Significant Changes

- FTE's: There was a net increase of 3.86 FTE from the 1994-95 adopted budget. During 1994-95, three Bud Mods were approved, increasing 1994-95 FTE by 5.78; when the changes are annualized, the total effect of these Bud Mods increases 1995-96 FTE by 9.05. The annualization of the sex offender program increases 1995-96 FTE by 1.87. In order to meet constraint, JJD eliminated 1 PDS Senior, 1 Eligibility Specialist; 2.25 FTE were eliminated with the expiration of the grant for the Southeast District Office, and the expiration of another State grant reduced the Parole Transition Coordinator by .25 FTE.
- Revenues: The GIFT program was transferred to CFSD, reducing revenues by \$347,000. The State grant funding the Southeast District Office expired, reducing revenues by \$113,250. The Juvenile Parole grant expired, reducing revenues by \$14,700.

- Changes in the scope of operations: The 1995-96 budget reflects the first full year of operation of the Residential Sex Offender program, the Diversion program, and the Detention Reform Initiative.
- Juvenile Justice reorganized its program budget structure. It consolidated from nine programs to four, and expanded the number of activities within the programs. The resulting programs are: Juvenile Justice Management, Information & Business Services, Detention & Alternatives, and Community & Court Services. The Probation Counseling, Abused & Neglected Children, Intake & Adjudication and Court Process programs were consolidated into Community & Court Services. The new budget structure should allow improved accountability. It will more closely match the operating structure at the detail level, enabling supervisors to use LGFS reports to make budget-to-actual comparisons.

Issues for Discussion

1. Ballot Measure 11 Implementation

The implementation of Ballot Measure 11 will begin on April 1. The total impact on the County is still unknown. Many of the factors that will determine its effect will remain unresolved until we have a few months of experience to observe. The Legislature may also make substantial revisions to Measure 11 which will impact the County.

Measure 11 will increase the need for close custody beds at JDH and at the State training schools. We estimate that the average daily population (ADP) at JDH will increase by 6-12 beds. This will depend on the DA's charging decisions, the average length of time to trial, and the proportion of youth who are detained prior to adjudication. The latter two of these variables will increase under Measure 11. The ADP will also be very sensitive to the types of Measure 11 offenses that youths in the facility are charged for. If there were more youths charged with murder, the ADP would increase because murder trials tend to run much longer than 1-2 months.

At the same time that Measure 11 increases the demand for bed space, the Detention Reform Initiative will be implemented, reducing the number of youths who are detained. The pilot test ends May 15. It is not clear to what extent the Detention Reform Initiative will offset the increase in beds under Measure 11. Regardless of the net change in the number of beds required, the implementation of Measure 11 and the Detention Reform Initiative will both change the mix of youths detained at JDH to more serious offenders.

Opening the vacant 16-bed unit at JDH is the most promising interim response to Measure 11. This will require roughly \$148,000 to operate for the remainder of 1994-95 and \$575,000 for 1995-96. Postponing the residential sex offender implementation until June will free \$295,000 of the appropriation, which can help to cover the cost. Leasing 4 beds to Washington and Clackamas Counties would generate \$43,000 for the remainder of this year.

Additional Resources Needed for Ballot Measure 11 Implementation

	1994-95 <u>Resources</u>	1994-95 <u>Reqs</u>	1995-96 <u>Resources</u>	1995-96 <u>Reqs</u>
Operate new 16-bed unit		\$148,000		\$575,000
Fund JJD contingency needs		\$130,000		
Delay sex offender until June	\$365,000			
Operate sex offender prog in June		\$70,000		
Lease 4 beds to Wash./Clack.	\$43,000		\$178,000	
Lease 2 sex offender beds			\$144,000	
<i>Additional funds needed for JJD base</i>			<i>\$253,000</i>	

Measure 11 will also affect the capacity at MacLaren, since the average length of stay for committed Measure 11 youth will increase substantially. All Measure 11 youths committed to MacLaren will be held there until they turn 18 and are transferred to the adult system. Presently, Multnomah County youths have an average length of stay of 4-6 months at MacLaren.

2. Managing the Cap at MacLaren

The County has had difficulty staying within its commitment limit for the State training schools for some time, but the problem has recently become urgent. In February, the County exceeded its cap of 77 youths by 23. The number of County youths committed to MacLaren doubled from 72 to 142 between 1991 and 1994. In the past, MacLaren was able to manage our overflow because other counties were under cap. However, the number of commitments from these counties has also been rising, so there is no slack in the system. The State's 400 planned new regional beds will not be available for several years, and many of them may be usurped by Measure 11; meanwhile, MacLaren wants the County to respond quickly to reduce our commitments.

In response to the crisis, the County has had to release some youths prematurely so that others with more serious offenses could be committed. In the long run, this exacerbates the problem, since youths are not able to complete the programs at MacLaren and are released to community placements before they are ready. They displace other youths from the community slots, and the consequences are felt throughout the system. The result is a system where each service must support more youths with more serious offenses than it was designed to support.

The Board should consider the following alternatives to improve the County's ability to manage its cap:

- Construct more beds at JJD to serve as a filter for youths going into or coming out of MacLaren. Current estimates suggest that it would cost \$3.4 million to build a 32-bed pod, and \$6.5 million to build a 64-bed pod. Part of this could be offset by leasing 16 beds to Washington County. It would be more cost effective to build the full 64 beds now than to build 32 now and delay 32 for later. The operating costs for 64 beds (or 48) would be prohibitively expensive, however, since it costs approximately \$575,000 to operate a 16 bed unit for a year. The new beds could be used to:
 - detain parole violators while they await trial to provide a filter for MacLaren
 - provide beds to serve as back-ups to community placements for probation violators
 - establish a Drug & Alcohol treatment unit
 - provide a transition for youths from MacLaren to community placements
- Develop an agreement with other counties that Multnomah County will reserve a fixed number of beds for their misdemeanants, who will be detained in our facility rather than MacLaren. The offsetting number of beds at MacLaren would be used for our youths with more serious offenses. This would reduce the number of detention beds available for Multnomah County

youths, but increase our beds at the State training school. It is not clear what the cost of this option would be.

- Increase the funding for community contracts for probation and/or parole violators. Develop more intensive monitoring for probation violators, possibly through a day reporting center.
- Place the issue of the MacLaren cap on the County's Legislative agenda. Both the size of the cap and the basis for its allocation are issues for discussion. The Legislature should be encouraged to approach the problem based on statewide risk assessment, rather than distribution of at-risk populations.

JJD has two add packages that bear on this problem. State funding for the Southeast District Office has been eliminated, and the Division requests \$103,109 to restore the loss. The funding supported 2.25 positions: 1 Juvenile Court Counselor, 1 Groupworker, and .25 OA2. The Southeast Office probation counselors have caseloads of 45-50 youths per counselor, and the elimination of these positions will increase caseloads beyond levels at which counselors can provide effective supervision. JJD staff estimate that a supervision caseload of 30-35 youths per counselor is a reasonable ratio. With increased caseloads, counselors are pressured to close cases faster and can provide youths less supervision. This reduces the effectiveness of the counseling and increases the probability that the youth will come back through the system.

JJD is also requesting \$14,702 to restore the Parole Transition Coordinator by .25 FTE to a full time position. The Parole Transition Coordinator provides a filtering system by determining which youths to release from MacLaren and by developing plans for their transition into the community. By choosing how to manage our scarce MacLaren resources, and how best to match paroled youths to community placements, the Parole Transition Coordinator optimizes the system's outcomes. It may be possible to fund this with State Commission on Children & Families minority overrepresentation funds.

Failure to restore the Parole Transition Coordinator and Southeast Office may exacerbate our problems with recidivism and cap management. I recommend that the BCC restore both of these funding reductions. Both programs relieve the strain on the system. However, restoration leaves us at the status quo, which is not functioning adequately. Additional action is therefore needed to reduce our MacLaren commitments.

3. Detention Overtime & Temporary Expenditures

JJD's 1995-96 request budgets the same dollar amount for detention overtime and temporary as the 1994-95 request. I am concerned that this will lead to a need for contingency funding in 1995-96 if overtime and temporary are not adequately built into the base budget.

At the end of January, Detention had spent 115% of its budget for overtime and 82% of its temporary budget. Projecting total 1994-95 expenditures based on January's actual expenditures indicates that JJD will overspend Detention overtime by \$180,000, and temporary by \$95,000; projections based on Year-to-Date expenditures suggest overexpenditures of \$96,000 in overtime and \$117,000 in temporary. Premium may be overspent by \$76-83,000. On the other hand, a surplus of \$230-261,000 is projected in permanent. The projected deficits are likely to be overstated because January typically requires above-average levels of overtime and temporary coverage. Also, the year-to-date projection overstates temporary and overtime because there are more holidays in the first portion of the year.

The surplus in permanent will partially offset these deficits this year, as will vacancy savings from some counseling and senior management positions. To cover the remainder of the deficit, JJD has requested \$131,896 in contingency funding for the current year to pay for suicide watch (\$49,461) and double coverage of the coed unit (\$82,435). These items have not been built into the 1995-96 budget or requested in add packages, so they will not offset costs in 1995-96.

Detention Personal Services Budget						
	Budget 94-95	Actual 94-95 YTD	Projected (from Jan.) 94-95	Projected (from YTD) 94-95	Estimated Deficit Range	Budget 95-96
Detention						
• Permanent	\$1,728,963	\$877,550	\$1,467,835	\$1,496,997	\$232-261K surplus	\$1,941,985
• Temporary	\$298,037	\$243,511	\$392,601	\$415,401	\$95-117K	\$298,037
• Overtime	\$100,168	\$114,802	\$279,827	\$195,839	\$96-180K	\$100,168
• Premium	\$34,759	\$68,990	\$110,535	\$117,689	\$76-83K	\$34,759

Three issues regarding the Detention temporary and overtime budget must be resolved:

- *How much does temporary and overtime cost for our Detention operations?* I recognize that my estimates may exaggerate the costs of temporary and overtime, but costs clearly exceed the amount budgeted.
- *How should JJD budget for these costs - explicitly or through salary savings?* Deficits in temporary and overtime have been historically offset by surpluses in permanent. However, I recommend that JJD budget temporary and overtime objects at their full estimated level, based on historical costs. Any projected salary savings should be itemized on a Bud 2 form and reduced from the permanent object code.
- *Can JJD cover these costs within its base budget, or does it require additional appropriations?* I don't agree that JJD can fully cover temporary and overtime costs in its base budget. The contingency request for double coverage for the co-ed unit will help reduce deficits by \$82,000 this year. JJD will continue to require double coverage in 1995-96, but there is no provision for it in the base budget.

Several factors have caused the costs of the Detention operation to increase. The new building has smaller units than the Donald E. Long Home (16 beds vs. 22) but the same staffing configuration for a unit. More security and monitoring staff are needed to run the new building. Also, the settlement of the consent decree increased training requirements for staff, causing greater temporary and overtime costs. As these factors contributed to the costs of the operation, the overtime and temporary budgets were reduced in the past to balance the remainder of the budget, with the result that large deficits emerged in these categories.

There are several options for addressing the Detention temporary and overtime budget at this point in the process. JJD can present an add package for the amount needed to cover these costs (exact magnitude to be determined). Alternately, the Division can build these costs into the base budget, removing other program expenditures and presenting them as an add package. A third option is to budget salary savings and use that to cover these costs; I don't recommend this approach, however. As a 24-hour operation with post positions, JJD has fewer positions in which it can realize salary savings than other departments. JJD pays a penalty for turnover among Groupworkers because it must provide temporary coverage throughout the vacancy, plus 120 hours of overtime/temporary coverage while a new employee receives training. Temporary and overtime expenditures are a fact of life in a 24-hour operation, and they should be built into JJD's base budget to reflect that.

4. JJD Infrastructure Staff

The Division requests \$205,056 in ongoing funds to create 4 "infrastructure" positions. JJD has indicated that the Program Evaluation Specialist is a high priority within this request. The Division is striving to rely more on data and less on intuition in its decision-making, but it does not have the present capacity for evaluation and analysis. This capacity would be extremely valuable in analyzing problems such as the MacLaren cap discussed above. I support this request, but I believe the fiscal position should be an even higher priority. JJD is plainly understaffed for fiscal

operations, which has contributed to its fiscal administration problems. A staff of 3 performs all budget, accounting, receivables and payables work for the division. I do not believe that JJD can improve its fiscal administration capacity without at least one more fiscal position.

JJD also requests the addition of a Counseling Manager position to oversee the Community/Court Services operation. Bill Morris, Counseling Administrator, has been informally assuming these responsibilities, but this has been on top of his primary duties. Rather than adding a new position, I recommend that the BCC reclassify the Counseling Administrator to a Counseling Manager position. JJD's request is valid, and my recommendation will result in a Counseling Manager who is spread too thin, but we should not create new levels of management before the new director has been involved in designing the organizational structure.

The final request is for an OA Sr to perform purchasing for the department. As a 24 hour residential operation, JJD's purchasing is more complex than most departments. This function is currently performed by the Sr OA in Detention whose responsibilities include payroll and all of Detention's clerical functions, and the Director's Administrative Secretary who has many other responsibilities. There is a clear need for a full-time OA; if full funds are not available, the BCC should consider at least a half-time OA Sr to perform this task, since purchasing tasks have become so extensive that the responsibilities are spilling over onto other staff as well.

5. Regional Detention Bed Leases

The County presently leases 20 detention beds to Washington and Clackamas Counties. In addition to the lease payments, Washington and Clackamas are billed annually for building management costs and for care & custody.

Due to a combination of program changes and communication gaps that emerged in the fragmented billing process, the County is no longer fully recovering its costs for regional detention in either the building management or the care & custody areas. We have been undercharging Washington and Clackamas for overhead costs, the JDH health clinic, and the building management/utilities charges for common detention areas. Incorporating these costs would increase revenues from Washington and Clackamas counties by \$154,542 in 1995-96. Of this, health clinic increases comprise \$64,900, indirect costs \$29,000, and building management \$61,000.

The estimate above includes indirect costs. The Board decided not to charge Washington & Clackamas for indirect costs several years ago. The BCC should revisit the question of charging Washington & Clackamas for indirect costs. Without this ability, we cannot recover our full costs of doing business.

The decision not to charge for indirect costs is based on a policy decision made by the Board several years ago. I recommend that the BCC revisit the question of charging Washington & Clackamas for indirect costs, so that we can recover our full costs of doing business.

The terms of the annual intergovernmental agreement governing care & custody charges require the County to provide notification by January 1 if it is going to raise rates by more than 10%. At that point, we had not yet completed the cost analysis, so we must stay within the 10% limit this year for the 20 beds. By raising the rates the entire 10% allowed, we can move toward the goal of full cost recovery by \$70,345 this year. The building management costs are not limited by this agreement.

The bed leases have been part of an ongoing effort for regional solutions to juvenile crime. Several other bed lease arrangements are presently under consideration. If the County enters any new leases with Washington and Clackamas, it should be on a full cost basis. Otherwise, Multnomah County taxpayers must subsidize Washington & Clackamas County's juvenile justice systems.

6. AITP Medicaid Funding

Medicaid revenues for the AIT program are anticipated to fall short of budgeted amounts this year. The problem is due to changes in Medicaid billing practices, and it will persist in future fiscal years. For the current year, the shortfall is likely to be \$10,000-15,000 per month; the exact amount has not been determined yet.

JJD staff have been working with the Children & Youth Program to develop a solution to the revenue shortfall. They have considered a range of options, including reconfiguring the program to reduce overall staffing levels. These changes may help to prevent future deficits, but it is too late in the year to completely fill the gap through program changes. The program is likely to require contingency funding, but it is not yet clear how much.

This situation demonstrates the difficulty of funding a detention-based treatment program with Medicaid revenues. Medicaid reimbursements are available only for treatment, but a detention program necessarily entails many non-treatment components. Future efforts to secure Medicaid funding for detention-based programs, such as the residential sex offender program, should weigh the required costs for achieving Medicaid eligibility (reporting and high staffing requirements) against the prospective Medicaid revenues, always considering how both relate to the desired objectives of the program. We should also explore whether it makes sense to continue to operate AITP as a Medicaid program. This issue is complicated because the Medicaid funds have allowed JJD to reprogram CSD money for some of its community contracts.

cc: Beverly Stein, County Chair
Bill Farver, Executive Assistant
Meganne Steele, Staff Assistant
Jim Anderson, Acting JJD Director
Jann Brown, Data Systems Manager
Marie Eighmey, Fiscal Specialist Supervisor
Bill Morris, Juvenile Counseling Administrator
Rich Scott, Detention Program Administrator
Rick Jensen, Detention Reform Initiative Manager



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TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Library Department's 1995-96 Request

1. Constraint Discussion

The library's General Fund constraint is \$6,021,162 which is arrived at by increasing their 1994-95 adopted budget by \$52,000 for facilities. The Library is requesting for \$6,021,162, which meets constraint. The Library was able to meet constraint by budgeting salary savings; cutting Books by Mail contract with Washington County Cooperative Library System; cutting Midland Library saving facilities, supplies and telephone costs; and reducing the use of on call employees by using Midland staff to cover where needed.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94 Actual</u>	<u>1994-95 Current Estimate</u>	<u>1994-95 Adopted Budget</u>	<u>1995-96 Proposed Budget</u>	<u>Difference</u>
Staffing FTE	307.03	320.95	320.95	317.19	(3.76)
Personal Services	\$12,146,674	\$12,448,861	\$13,260,589	\$13,241,227	(\$19,362)
Contractual Services	275,873	510,845	415,961	415,663	(298)
Materials & Supplies	6,274,018	6,929,768	7,127,978	7,264,648	136,670
Capital Outlay	<u>152,240</u>	<u>149,550</u>	<u>149,550</u>	<u>141,850</u>	<u>(7,700)</u>
Total Costs	\$18,848,805	\$20,039,024	\$20,954,078	\$21,063,388	\$109,310
Program Revenues	\$14,895,522	\$15,049,310	\$15,491,694	\$15,042,226	(\$449,468)
General Fund Support	\$6,004,724	\$5,061,009	\$5,462,384	\$6,021,162	\$558,778

3. Significant Changes

3.76 FTE (2.02 Central, 0.26 Community, 2.48 Systemwide, 1 addition in Enterprise) reduction in vacant FTE's. Program revenues have gone down mainly due to a smaller Beginning Working Capital because of higher spending this year.

4. Add Packages

Add #1 requests \$103,358 to move and store (\$16,780 one time) the Midland Library collection during construction of the new building, provide an opening collection (\$50,000), and increase staff by 4.75 FTE for about one month in the 1995-96 FY (\$29,278) to meet expected increased usage of the new Library. The new Library will be larger than Gresham, and Gresham's circulation is 60% larger than present Midland. Midland should be staffed at the same level as Gresham and hours extended from the current 45 to 49. Augmenting the Library Materials collection, especially of high demand items, is desirable. An alternative is to wait till FY 1996-97 to add extra service, since the Library will only be open for about 1 month in FY 1995-96. This will adversely impact public service at the Library. Long queues will be the norm. This alternative will still require \$16,780 for moving and storage. I recommend exploration on the use of construction contingency to pay for moving and storage and for expanded library materials. A contingency request could be put together towards the end of the year when we are more certain of when the Library will open. There will be a big increase required to operate Midland in 1996-97 when it will be open for the whole year.

Add #2 requests \$265,991 to combine Library information resources onto personal computers (70) in all locations to add access points for this information. It also provides additional telephone line capability so electronic services are not limited by buildings, hours of service, etc. It will also add 1 FTE computer technician and 0.5 FTE training positions to add and manage the additional computer resources and assist patrons and staff in database searching, using internet, etc. This request is one-time only except for \$52,387 for the additional staff and \$406 for telephone lines. ISD is very supportive of this proposal. An alternative is to add computers at a slower rate, and spreading it out among all the branches so they all will have some extra PC capabilities. Another alternative is to do nothing, and just have the Library update PC's at the current pace. Even though this is an excellent idea, I recommend not doing anything at this time until more is known about State cutbacks to the County.

Add #3 requests \$107,600 to assist schools in meeting the library needs of young people. Schools have cut back on school library services as a result of reduced budgets. This add package is to carry out a specific plan for cooperation possibly including such tools as technological links, joint facilities, Library use helps - training and print for students and school staff, etc. The plan is expected to be completed by June, 1995. The Board expressed an intent to help schools out in the last budget process. This would be one way of carrying out the intent of the Board. However, I recommend waiting until the State has informed the County on cutbacks before approving this request.

Add #4 requests \$19,905 for an automated substitute staff scheduling system. This system automatically locates appropriate personnel, calls substitutes to fill requests, maintains time reports and statistics. Requests for substitute staff can be made at all times. This will replace the 50% of time spent by a Sr. Office Assistant in scheduling staff. This employee has to physically call and schedule substitute staff, currently about 194 per month and receives about 30 phone calls daily on this topic. An alternative is to continue using the Sr. Office Assistant in this manner. Another alternative is to find a lower cost person to do this scheduling. I recommend approval of this system because it is cheaper and more efficient.

Add #5 requests \$48,834 one-time cost of installing and operating a Public Information Kiosk. Ongoing cost is expected to be \$7,000 annually. This kiosk would be placed in a high traffic public location. The kiosk can be programmed to provide a wide variety of government and community services. It would have access to the library's on-line catalog, CD net, etc. A phone line with direct access to County Departments can be provided. An alternative would be to have several governments share in the cost of the kiosk, since it appears that the user will be able to access their services. Another alternative is to get free space for the kiosk. However, this is

possible in only a few sites, and may not be very accessible. Yet another alternative is to be entrepreneurial and have advertisements, etc. pay for the kiosk. I recommend exploration of cost sharing opportunities.

5. Issues for Discussion

Services to Children and Teens. The Library will continue to provide services to children and teens through effective cooperation with schools. In addition, the Library is providing targeted service to at-risk youth by:

- "Homework Help" program of volunteer assistance to school age children at least twice weekly at 3 branch libraries.
- "Books While You Wait" lobby collections in 40 social service agencies.
- "Books 2 U", a booktalk outreach program in the Franklin/Marshall cluster of schools designed to entice the non-reader.
- "Beginning with Books" outreach and modeling to 30 teen parents, drug and alcohol abuse, and other centers serving the at-risk population.
- Personal Computers and CD-ROM reference tools
- "Families Read Together", an outreach program to at-risk families at 3 branch libraries that provides opportunities for reading, storytimes, parenting information workshops, and the creation of a family activity book with exposure to computers and desktop publishing.

Library Serial Levy Campaign in 1996. The Serial Levy runs out every three years and requires another vote. An alternative is to roll this into the tax base at some time.

Joint Use facility at Parkrose. The new Parkrose High School will have several buildings that are accessible to the community. Options for running this joint use facility are:

- Library Outreach Services rotates library materials and provides staff only at peak hours. Lowest cost and service.
- County and School jointly operate the facility. Costs more, and presents contractual, policy hurdles.
- County operates the facilities. Greatest cost unless Gregory Heights branch is closed.

Develop a Branch Development Plan with widespread community participation to guide community library services into the 21st Century. It will designate where new Library facilities should be located, under what circumstances new library facilities should be developed and provide a blueprint and schedule for moving to a tiered system of service delivery, where some services are available at some branches and not others.

Transcentral/Central. The Library will continue to plan for services and organizational change in the renovated Central. Changes in layout, etc. at Transcentral could serve as possible service models for the renovated Central Library.

Entrepreneurial Activities. An Entrepreneurial Activities Coordinator has been hired and is looking into fund raising recommendations of the Library Entrepreneurial Initiatives Team (LEIT), appointed by the Board in early 1994. He is also looking at implementing new activities and enhancing existing ones. Some businesses have expressed their displeasure at the Library possibly providing services that compete with them.

6. Budget Office Recommendations

Approval of Add #4, strategic no's for #1,2,3, and a recommendation to seek further cost sharing opportunities for the kiosk (Add #5).

- c Beverly Stein, County Chair
- Bill Farver, Executive Assistant
- Meganne Steele, Staff Assistant
- Ginnie Cooper, Library Director
- Jeanne Goodrich, Deputy Library Director
- Margaret Epting, Support Services Director



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PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Affirmative Action's 1995-96 Request

1. Constraint Discussion

Affirmative Action's constraint is \$205,094, the 1994-95 adopted amount. They are requesting for \$183,930. Their request is under constraint by \$21,164.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94</u> <u>Actual</u>	<u>1994-95</u> <u>Current</u> <u>Estimate</u>	<u>1994-95</u> <u>Adopted</u> <u>Budget</u>	<u>1995-96</u> <u>Proposed</u> <u>Budget</u>	<u>Difference</u>
Staffing FTE	3.00	3.50	3.50	3.00	(0.50)
Personal Services	\$140,579	\$185,504	\$185,504	\$164,340	(\$21,164)
Contractual Services	4,511	3,040	3,040	1,500	(1,540)
Materials & Supplies	16,921	16,550	16,550	18,090	1,540
Capital Outlay	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total Costs	\$162,011	\$205,094	\$205,094	\$183,930	(\$21,164)
Program Revenues	\$0	\$0	\$0	\$0	\$0
General Fund Support	\$162,011	\$205,094	\$205,094	\$183,930	(\$21,164)

3. Significant Changes

0.5 FTE reduction resulting in savings of \$31,249.

4. Add Packages

The Affirmative Action (AA) office is requesting for \$31,249 to restore 0.5 FTE ADA Coordinator. This add package, if approved, will bring AA's 1995-96 budget request \$10,085 above their constraint. The ADA Coordinator develops a training program for managers (training to begin in September) about providing reasonable accommodation for applicants and employees, audits (goes to site and inspects) departments & divisions for compliance with the transition plan and self evaluation, audits employee service division class specifications to ensure essential job functions are listed and accurate, and investigates program and employment complaints (13 this FY). The number of complaints is projected to increase as people learn about the complaint process. An alternative to this position is to spread out responsibility. Employee Services and DES would be the primary departments involved. Review of jobs should be Employee Services Division's responsibility. Facilities has a plan in place to comply with ADA (\$500,000 annually). It appears that some of the duties of this position could and maybe should be someone else's responsibility ie, Employee Services, Facilities. Investigating complaints and developing, possibly conducting training on ADA would then be the primary responsibilities of this position.

5. Issues for Discussion

Collaborate with Employee Services to produce semi-annual reports designed to measure employees' opinions and attitudes on terminating employment. Surveys will be sent out quarterly. Reason for doing this is determine if there are things the County could do to retain employees. ISD is setting up a system now and the first survey is expected to go out in July.

Actively recruit from underutilized groups on an ongoing basis. This will require such steps such as developing recruitment and outreach strategies for job classes where underutilization occurs. Cooperation and coordination with Employee Services is essential. The outcome would be a more diverse workforce.

Fully implement the Criterion Affirmative Action Monitoring System (CAAMS) to provide quarterly monitoring reports, and annual affirmative action statistical adjustments designed to identify deficiencies and measure the effectiveness of the Affirmative Action's efforts in helping departments achieve diversity. Departments will be provided with these reports, and are expected to use these reports to help them achieve the goals of the Affirmative Action Plan.

Review and report quarterly ADA transition plan compliance. This plan was developed by Affirmative Action in conjunction with County departments. This plan is available to all County departments to help bring County facilities up to ADA standards. Facilities would be most responsible for ADA compliance.

Develop and implement mediation/conflict resolution processes for dispute resolution. It involves change from investigatory process to problem solving process. The outcome is a reduction of conflicts and reduction of filing of external complaints to BOLI, EEOC, etc.

6. Budget Office Recommendations

Exit survey to terminated employees should be sent out as soon as possible instead of quarterly. Add package to restore 0.5 FTE for ADA is recommended.

c Robert Phillips, Affirmative Action Officer



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TO: Barry Crook, Budget and Quality Manager
FROM: Ching Hay, Budget Analyst *CH*
DATE: April 17, 1995
SUBJECT: Budget Analysis of Budget Division's 1995-96 Request

1. Constraint Discussion

Budget's constraint is \$779,638, which is this year's adopted budget less one time only \$20,000 on-line policies/procedures and \$14,189 adjustment for Building Management. We are requesting for \$779,638 which meets constraint. We arrived at constraint by budgeting salary savings of \$6,968, reducing printing, and equipment.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94 Actual</u>	<u>1994-95 Current Estimate</u>	<u>1994-95 Adopted Budget</u>	<u>1995-96 Proposed Budget</u>	<u>Difference</u>
Staffing FTE	9.00	11.00	11.00	11.00	0.00
Personal Services	\$457,573	\$574,298	\$657,630	\$666,442	\$8,812
Contractual Services	8,590	13,152	13,152	1,600	(11,552)
Materials & Supplies	49,719	132,745	104,367	106,296	1,929
Capital Outlay	<u>6,824</u>	<u>35,000</u>	<u>10,300</u>	<u>5,300</u>	<u>(5,000)</u>
Total Costs	\$522,706	\$755,195	\$785,449	\$779,638	(\$5,811)
Program Revenues	\$0	\$0	\$0	\$0	\$0
General Fund Support	\$522,706	\$755,195	\$785,449	\$779,638	(\$5,811)

3. Significant Changes

Professional Services is reduced by \$11,552 due mainly to the sex offender treatment study. \$20,000 for On-line Policies and Procedures is eliminated, but this may be carried over if not completed this year.

4. Add Packages

The Budget and Quality Division is requesting \$11,825 to restore printing to current service level. The quantity and types of documents printed has increased. This includes new types of documents such as Key Results and the Performance Report. This request will allow printing at the 1994-95 level. An alternative is to reduce the number of copies of each type of document produced and when we run out, decline to fulfill requests for copies. Another alternative is to charge for copies requested that are above a certain quantity or to charge for all copies. However, both alternatives have not been past practice, and may result in some ill will. I therefore recommend approval of this add request.

5. Issues for Discussion

Review options and make recommendations to the Board regarding **two year budget**. A task force will be looking at approaches utilized by other jurisdictions in implementing 2 year budgets. It will also look at all other implementation issues such as modifying the existing budget system, determining if LGFS's budget preparation module could accommodate a 2 year budget. A recommendation and implementation timeline is expected to be forthcoming August 1995.

6. Budget Office Recommendations

Highly recommend approval of the add request.

c Beverly Stein, County Chair
Bill Farver, Executive Assistant
Meganne Steele, Staff Assistant
Dave Warren, Principal Budget Analyst



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PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of County Counsel's 1995-96 Request

1. Constraint Discussion

County Counsel's General Fund constraint is \$631,660, which is this year's adopted budget less \$18,755 facilities adjustment because of smaller space usage than originally thought. County Counsel's General Fund request is \$602,024, which is under constraint by \$29,636. To arrive at constraint, County Counsel had to cut a Law Clerk position. The Insurance Fund request is \$682,748 for a total request of \$1,284,772.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94 Actual</u>	<u>1994-95 Current Estimate</u>	<u>1994-95 Adopted Budget</u>	<u>1995-96 Proposed Budget</u>	<u>Difference</u>
Staffing FTE	16.00	17.00	17.00	17.00	0.00
Personal Services	\$962,697	\$1,038,353	\$1,062,023	\$1,086,576	\$24,553
Contractual Services	10,189	16,451	29,400	19,400	(10,000)
Materials & Supplies	48,985	201,694	207,358	178,796	(28,562)
Capital Outlay	<u>6,399</u>	<u>8,850</u>	<u>8,850</u>	<u>0</u>	<u>(8,850)</u>
Total Costs	\$1,028,270	\$1,265,348	\$1,307,631	\$1,284,772	(\$22,859)
Program Revenues	\$471,489	\$633,239	\$657,216	\$682,748	\$25,532
General Fund Support	\$556,781	\$632,109	\$650,415	\$602,024	(\$48,391)

3. Significant Changes

Cut of 1 FTE Law Clerk to meet General Fund constraint.

4. Add Packages

County Counsel is requesting \$47,618 to restore a Law Clerk cut to meet constraint. With this add package, County Counsel's General Fund request is \$17,982 over constraint. The Law Clerk provides research and legal writing talents to 7 advisory attorneys. This research is incorporated in legal advice and opinions to all County clients, and in non-tort litigation. If the cut is not restored, the advisory lawyers must do time consuming research, which will have an effect on the efficiency and speed of legal service delivery. An alternative is to budget this position (or some of it) in the Insurance Fund, but this presents its own set of problems such as if the position qualifies as Insurance Fund allowable. In addition, Insurance Fund expenditures are ultimately mostly paid by other County departments. Another alternative is to budget vacancy savings. Average savings over the last 3 years has been about \$12,000, varying from \$16,000 over budget to \$49,092 under budget. According to County Counsel, failure to fill a vacant position for the length of time needed to generate sufficient savings would create a gap in legal services for too long. However, if there is a vacancy, it will probably take about two months to fill it. I therefore recommend restoring the cut position and budgeting the amount over constraint (\$17,982) as vacancy savings. There might also be some savings that could be derived from other MSS/Nond divisions.

5. Issues for Discussion

Develop and implement a plan for systematizing and expediting the contract review process. County Counsel reviews thousands of contracts annually. Much of this function can be made routine by using standardized provisions. Parts of the review process may be assignable to nonprofessional staff.

6. Budget Office Recommendations

Recommend restoring the cut position by budgeting vacancy savings.

- c Beverly Stein, County Chair
- Bill Farver, Executive Assistant
- Meganne Steele, Staff Assistant
- Larry Kressel, County Counsel
- John Dubay, Chief Assistant County Counsel
- Dave Warren, Principal Budget Analyst



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P. O. BOX 14700

PORTLAND, OR 97214

PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Emergency Management's 1995-96 Request

1. Constraint Discussion

Emergency Management's General Fund constraint is \$133,639, which is the same as the 1994-95 adopted budget. Emergency Management is requesting \$133,639 of General Fund resources so they have met the constraint. Their total request is for \$197,387.

2. Table of Budget Facts

Budget Trends

	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	<u>Difference</u>
Staffing FTE	3.00	3.00	3.00	3.00	0.00
Personal Services	\$134,714	\$149,593	\$149,593	\$154,248	\$4,655
Contractual Services	2,420	1,881	0	0	0
Materials & Supplies	21,570	51,563	54,089	43,139	(10,950)
Capital Outlay	<u>3,713</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total Costs	\$162,417	\$203,037	\$203,682	\$197,387	(\$6,295)
Program Revenues	\$61,445	\$70,171	\$70,043	\$63,748	(\$6,295)
General Fund Support	\$100,972	\$132,866	\$133,639	\$133,639	\$0

3. Significant Changes

There are no significant changes.

4. Add Packages

Add #1 requests \$8,139 to convert an existing hazardous materials response unit motorhome into a mobile emergency command post. The development of a mobile emergency command post has long been identified by emergency service agencies as a resource shortfall of the first response community. This mobile Emergency Command Post will be used by on-scene response agencies within Multnomah County for on-site coordination and command functions. The converted vehicle will have radio communications, desk space and display boards. It currently has radio communications but no desk space or display boards. Currently, the Sheriff's Office is using a 1950's step van as the only command post available in east county. Emergency Management is also working with the Sheriff's Office to use the vehicle in a secondary capacity during the summer as a community policing office for the gorge. Because of this use, the Sheriff's Office is assisting Emergency Management by writing a grant and/or requesting donations from private organizations or service clubs to fund the renovation sooner. I recommend setting aside the funds in contingency so that private contributions may be raised. A request could be made at a later date when the amount from private donations is known.

The second add requests \$17,396 for 5 weeks of overtime for mandatory on-call for non-exempt employee. The exempt Emergency Management Administrator normally performs on-call. When informed of an emergency, this person will inform appropriate people of the emergency. On-call must be performed by a non-exempt employee when the Administrator is on vacation because there are no other exempt employees in Emergency Management. The current Local 88 contract does not address mandatory overtime, but Article 14, item 14 covers voluntary standby pay. It says that employees may avail themselves of the opportunity of receiving additional pay by volunteering to be placed on standby. An alternative is to have someone else in the County perform this duty but there might be a grievance filed. Another alternative is to have the City or someone outside of the County perform this duty, but there are political issues attached to this. Labor Relations is willing to pursue a '1 hour paid for 8 on mandatory on-call' provision with Local 88 that is similar to one in the Sheriff contract. There may be other approaches. I recommend that an agreement be pursued with Local 88, with an adjustment made to Emergency Management's budget when the outcome is known.

5. Issues for Discussion

The future of Emergency Management including such issues as funding and consolidation.

6. Budget Office Recommendations

Recommend setting aside the renovation of motorhome money in contingency. Recommend that Labor Relations pursue an agreement with Local 88.

- c Beverly Stein, County Chair
- Bill Farver, Executive Assistant
- Meganne Steele, Staff Assistant
- Penny Malmquist, Emergency Management Administrator
- Ken Upton, Labor Relations Manager
- Dave Warren, Principal Budget Analyst



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TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Employee Services 1995-96 Request

1. Constraint Discussion

Employee Services General Fund constraint is \$1,003,351, which is their 1994-95 adopted budget plus \$7,072 for facilities. Employee Services is requesting for \$1,016,792 of General Fund expenditures for 1995-96. This request exceeds the constraint by \$13,441. This is not the process that we have asked all other departments to comply with, which is to create a budget that meets constraint, with add packages to restore current service level, if desired. Employee Services is unable to cut any more Materials and Supplies because of continuous reductions in that category.

2. Table of Budget Facts

<u>Budget Trends</u>	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current Estimate</u>	<u>Adopted Budget</u>	<u>Proposed Budget</u>	<u>Difference</u>
Staffing FTE	20.53	20.53	20.53	20.53	0.00
Personal Services	\$953,252	\$1,026,315	\$1,051,231	\$1,057,605	\$6,374
Contractual Services	727,590	410,600	409,281	395,044	(14,237)
Materials & Supplies	14,243,791	17,749,281	17,720,429	292,937	(17,427,492)
Capital Outlay	<u>11,846</u>	<u>11,371</u>	<u>14,835</u>	<u>16,748</u>	<u>1,913</u>
Total Costs	\$15,936,479	\$19,197,567	\$19,195,776	\$1,762,334	(\$17,433,442)
Program Revenues	\$15,083,255	\$18,190,288	\$18,199,497	\$745,542	(\$17,453,955)
General Fund Support	\$853,224	\$1,007,279	\$996,279	\$1,016,792	\$20,513

3. Significant Changes

The significant changes in the table above are insurance fund expenditures and revenues, which have not been calculated yet. They will be calculated when all budgets are in the budget system. Insurance fund revenues are mostly based on budgeted insurance in Personal Services. As such, I do not expect to see wide fluctuation.

4. Add Packages (Attached)

Employee Services has 1 add package and it requests for an additional \$303,343 to support the RESULTS campaign. They currently have \$48,200 budgeted fro RESULTS. The additional resources will do the following:

- \$231,239 for training. Conduct a training workshop for key stakeholders, with emphasis on in-house trainers as the County becomes better versed in quality improvement concepts and processes. Training all employees in basic concepts of quality improvement, techniques, etc. A portion of these funds will be given to departments to use for unique requirements. I recommend approval of additional money for training employees to be more effective and efficient in their jobs. The budgeting options to achieve this are to put the training money in Employee Services or to put it in the Departments. Employee Services would be responsible for training that is continuous and that most employees will go to. The training in this add package appears to meet that criteria so it is appropriate to budget it here.
- Continue to provide project grants to nurture quality work teams(\$1,000 addition).
- Reinforce successful projects and encourage quality expansion through a periodic newsletter (2 extra printings \$1,000).
- Establish employee awards program(\$14,000) - It is in this year's budget (\$2/FTE) but not widely known. Half to departments and half to Employee Services for County wide recognition. An alternative is to abolish this program. Another alternative is to increase the amount for each employee by a substantial amount so that it can be used to provide incentives. I am recommending either abolishing or substantially increasing (\$20/FTE?) the employee awards program.
- Piloting mentor program, coaching relationship to help employees develop their careers. Training money is needed for the first year with minor amounts from then out. Publicizing this should be through regular channels.
- Increase staffing in the Training section by reclassifying a current Employee Services Spec I to a Training Administrator, addition of 0.5 Office Assistant II to help with doing all of the above. The Training Administrator (job description attached) will administer a comprehensive County-wide training and organizational development program. An alternative would be to continue using the Employee Services Specialist I. Continuation of using Employee Services Spec. 1 would be appropriate if all that is needed is organizing and coordination of activities to bring about successful training sessions. I think that if the County embarks on a major expansion of training as asked for in this add package, a reclassification and an addition of 0.5 FTE OA2 is recommended. The Training administrator would also be an expert on CQI concepts, and will provide training him/herself.

The Budget Office recommends approval of this add package, except as noted for Employee Awards.

5. Issues for Discussion

Developing and implementing a County training policy and programs to support the strategic plan adopted by the RESULTS steering committee. This will require that the strategic plan be adopted first, so that training programs can be designed to support the strategic plan. However, the proposed courses in the add package appear likely to be the type of quality improvement courses that the County will want to deliver to all employees uniformly.

Develop an improved process for communicating human resource policies and procedures to managers and supervisors by January, 1996, in order to support their ability to implement such policies in a time efficient, cost effective, and consistent manner. Some ideas for doing this include delivering additional training, which has

already begun in 1994-95 in the form of "HR Updates" and advocating the implementation of an on-line policy manual system, which is under development.

Initiate a process to review and improve all divisional service delivery systems. For recruitment and classification systems, complete review and begin improvement implementation by April, 1996. This process will ensure through the use of mapping and a stakeholders and customers advisory team, that the system will be exactly described and the subjected to incremental quality improvements to enhance customer satisfaction.

6. Budget Office Recommendations

I recommend approval of the add package and allowing Employee Services to retain the \$13,441 over their constraint.

c Curtis Smith, Employee Services
Sue Ayers



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PORTLAND, OR 97214

PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Finance Division's 1995-96 Request

1. Constraint Discussion

Finance Division's General Fund constraint is \$3,096,913, which is their 1994-95 adopted budget adjusted for 1995-96 dedicated revenues. Their General Fund request is for \$3,096,913 which meets the constraint. Their total request is for \$3,122,956, of which \$26,043 is Insurance Fund.

2. Table of Budget Facts

<u>Budget Trends</u>	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	<u>Difference</u>
Staffing FTE	50.50	51.50	51.50	52.00	0.50
Personal Services	\$2,205,618	\$2,302,940	\$2,408,303	\$2,449,719	\$41,416
Contractual Services	202,054	240,751	240,751	214,450	(26,301)
Materials & Supplies	213,035	430,683	430,683	458,787	28,104
Capital Outlay	<u>41,230</u>	<u>23,500</u>	<u>23,500</u>	<u>0</u>	<u>(23,500)</u>
Total Costs	\$2,661,937	\$2,997,874	\$3,103,237	\$3,122,956	\$19,719
Program Revenues	\$172,418	\$245,526	\$331,322	\$390,476	\$59,154
General Fund Support	\$2,489,519	\$2,752,348	\$2,771,915	\$2,732,480	(\$39,435)

3. Significant Changes

Finance is adding a 0.5 FTE Data Analyst within constraint to be shared with Facilities Management for a LAN Coordinator in the Ford Building because Purchasing is at that location, and there is a need for the position. General Fund support is down because program revenues are up.

4. Add Packages

Finance has 2 add requests. The first requests \$21,250 for 0.5 FTE Fiscal Specialist 1 to implement the EEO Contractor Certification Program approved by Board Resolution 93-301. The outcome would be the ability to analyze workforce diversification efforts by public contractors. An alternative is to have the City provide this service for \$25,000 annually. It appears that there is a need to monitor progress, and the FTE approach appears to be more cost effective. With the request to eliminate the position of Purchasing Director, there will be some other changes. I do not recommend approval of this request. Reorganization of Purchasing and Central Stores might result in some efficiencies.

The second add requests a one time \$5,000 to help the local Government Finance Officers Association (GFOA) raise part of the \$165,000 needed for ground transportation and hosting a welcoming event for 4,000 delegates expected to attend the 1996 GFOA conference at the Convention Center. Local governments are expected to contribute about \$16,500. Remaining funds will be raised by a fund raising committee. If the committee raises more than their share, the excess will be refunded proportionately to local governments. METRO is contributing \$7,000 and other local governments have been approached. Based on past experience with the County contributing to government-type conventions held in Portland (NACO 98), I am recommending approval of this request.

5. Issues for Discussion

Vacancies and downward reclassification of positions has allowed Finance to maintain its budget within the constraint numbers. These savings may not materialize in the future and will make it difficult for Finance to prepare its budget within the constraint target.

Implementation of the on-line Version 14 of the LGFS (Local Government Finance System) including the graphics user interface pilot project approved by the Data Processing Committee. Version 14 is a major change in the way LGFS operates and will require extensive changes to forms and retraining of all users including Finance staff. Once installed and operational, users will be able to upload and download mainframe data from their personal computers.

Finance needs to **address the lack of training and communication with their customers.** The Finance Division survey indicates the need to improve customer relations regarding purchasing and contracts. Only 61.5% of their internal customers were satisfied with purchasing service. The other sections has a 92% or better overall satisfaction rating. However, the training component of the survey showed about an average of 75% satisfaction rating. To meet this need, Finance is proposing to reassign a Senior Fiscal Specialist from the MCBIT program to develop a comprehensive training program for Financial System users and to maintain continued contact with our vendors. The option to use another Senior Fiscal Specialist within Finance that currently deals with LGFS has been explored but found to be not feasible because this person is currently responsible for backing up the Accounting Manager, and also supervises accounting for service and assessment districts and fixed assets.

The last major issue facing Finance is their **proposed reclassification of the Purchasing Director's position.** This will provide savings of \$28,520 which Finance is using as vacancy savings. Finance is proposing to reclassify that position down to a Senior Purchasing Specialist. This change will restore a buyer position cut from the budget in 1993-94. In addition, the duties and responsibilities of the Purchasing Supervisor and Operations Supervisor will be increased to the same level as other section managers within Finance. Finance believes the position is needed because of the implementation of LGFS Version 14 and the need to improve customer service.

6. Budget Office Recommendations

I do not recommend approval of the addition of a Fiscal Specialist 1 position for reasons stated above. I recommend approval of the one-time \$5,000 support for GFOA Conference. Recommend approval of reclassifying of Purchasing Director position, upgrading 2 others within Purchasing to the level of section managers.

- c Beverly Stein, County Chair
- Bill Farver, Executive Assistant
- Meganne Steele, Staff Assistant
- Dave Boyer, Finance Director
- Dave Warren, Principal Budget Analyst



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PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager
FROM: Ching Hay, Budget Analyst *CH*
DATE: April 17, 1995
SUBJECT: Budget Analysis of Labor Relation's 1995-96 Request

1. Constraint Discussion

Labor Relation's constraint is \$296,394, which is their 1994-95 adopted budget less costs associated with the Labor Relation Specialist funded for one year, and some professional services and Facilities adjustment. Their request is for \$296,394, which meets the constraint.

2. Table of Budget Facts

<u>Budget Trends</u>	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current Estimate</u>	<u>Adopted Budget</u>	<u>Proposed Budget</u>	<u>Difference</u>
Staffing FTE	3.50	4.50	4.50	3.50	(1.00)
Personal Services	\$214,104	\$271,770	\$271,770	\$235,375	(\$36,395)
Contractual Services	9,633	21,885	35,143	22,320	(12,823)
Materials & Supplies	17,869	35,572	35,572	38,699	3,127
Capital Outlay	<u>2,265</u>	<u>4,576</u>	<u>4,576</u>	<u>0</u>	<u>(4,576)</u>
Total Costs	\$243,871	\$333,803	\$347,061	\$296,394	(\$50,667)
Program Revenues	\$0	\$0	\$0	\$0	\$0
General Fund Support	\$243,871	\$333,803	\$347,061	\$296,394	(\$50,667)

3. Significant Changes

Elimination of one Labor Relations Specialist, and associated costs. This person was hired because of the extra workload associated with the expiration of 7 collective bargaining agreements.

4. Add Packages

There are no add packages.

5. Issues for Discussion

Negotiate Prosecuting Attorneys Association collective bargaining agreement. This is expected to take from November 1995 to June 1996, including the period for salary survey work. Key issues associated to this bargaining involve measure 8, questions regarding legal County action.

Train managers in negotiation techniques. This is needed because of ongoing lack of training in negotiations for managers who bargain with external providers, but more directly related to the functioning of this office, this training allows managers to have an understanding of and skills in utilizing mutual gains techniques in an internal team environment. We expect to train about 100 managers. The outcome will be an enhanced skill in selection of conflict resolution techniques, and skill in achieving negotiated outcomes that serve County interests. No additional resources are needed.

Develop and implement a training course in management of substandard performance for the Office of the Sheriff. This is focus on the Sheriff because a manual and related training in management of substandard performance is in place outside the Sheriff's office. The Sheriff has expressed a desire to extend this process to MCSO with a focus on the MCCOA and MCDSA contracts in relation to the Internal Affairs Unit (IAU) process. Following training, it is expected that all MCSO supervisors will have an enhanced understanding of the just cause standard as it applies to the relevant contracts and IAU process. No additional resources needed.

Begin process of full contract review of pay, benefits, and work practice provisions of collective bargaining agreements. This long term project is expected to be completed by the fall of 1997 with phase 1 priority issues to be addressed in FY 95-96. This project will allow a thoughtful review of the entire spectrum of contractual issues working with the relevant bargaining units. This process anticipates consultation with all relevant elected officials and managers. No additional resources are needed.

6. Budget Office Recommendations

c Ken Upton, Labor Relations Manager



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P. O. BOX 14700

PORTLAND, OR 97214

PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Risk Management's 1995-96 Request

1. Constraint Discussion

Risk Management does not have a General Fund constraint as it is entirely funded out of the Insurance Fund. Their budget request is \$1,362,642.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94</u> <u>Actual</u>	<u>1994-95</u> <u>Current</u> <u>Estimate</u>	<u>1994-95</u> <u>Adopted</u> <u>Budget</u>	<u>1995-96</u> <u>Proposed</u> <u>Budget</u>	<u>Difference</u>
Staffing FTE	6.00	4.00	4.00	4.00	0.00
Personal Services	\$279,342	\$360,000	\$424,906	\$413,500	(\$11,406)
Contractual Services	188,529	229,000	229,000	283,000	54,000
Materials & Supplies	3,015,297	3,607,000	2,482,947	650,142	(1,832,805)
Capital Outlay	1,350	8,000	19,200	16,000	(3,200)
Total Costs	\$3,484,518	\$4,204,000	\$3,156,053	\$1,362,642	(\$1,793,411)
Program Revenues	\$3,484,518	\$4,204,000	\$3,156,053	\$1,362,642	(\$1,793,411)
General Fund Support	\$0	\$0	\$0	\$0	\$0

3. Significant Changes

Significant change of \$1,832,805 in materials and supplies is due to claims paid not being budgeted yet. Claims Paid will be budgeted when the County budget is in the budget system. Claims paid depends on the total amount budgeted in the insurance line, and that will be finalized close to the printing of the budget. I do not expect a significant change for Claims Paid as insurance rates have not changed significantly.

4. Add Packages

None

5. Issues for Discussion

Implement second phase of worker's compensation claims administration improvement project by July 1, 1996. The second phase will implement recommendations on claims administration, improve medical case management and cost containment strategies, evaluate and improve services to departments and employees. Outcome is cost containment and improved communication with departments and employees.

Consultant from Wyatt is likely to recommend that we have an on-site workers' compensation claims administrator. The administrator is expected to receive and investigate claims, issue payments, fill out reports to other agencies, etc. There are space concerns such as proximity to other Risk Management staff. This administrator will probably not be a County FTE, but will be contracted. A contract will also provide expertise in financial systems, service, appropriate personnel, etc. This contract will be by RFP. Cost is unknown at this time.

6. Budget Office Recommendations

- c Beverly Stein, County Chair
- Bill Farver, Executive Assistant
- Meganne Steele, Staff Assistant
- Jean Miley, Risk Management Manager
- Dave Warren, Principal Budget Analyst



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MEMORANDUM

TO: Barry Crook, Budget & Quality Manager

FROM: Shaun Coldwell, Budget Analyst

SUBJECT: SHERIFF'S OFFICE
BUDGET REQUEST 1995-96

DATE: March 14, 1995

This memo will serve as a summary for purposes of discussion of the Sheriff's Office budget request for fiscal year 1995-96.

Constraint Calculation

The MCSO constraint was based on the 1994-95 general fund allocation, with some adjustments:

- General fund costs were carried over into 1994-95 from the prior year for bar coding equipment; video imaging equipment; and MDT radio training. These costs were taken out of the 1994-95 allocation of ongoing general fund costs.
- General fund support for indirect costs associated with the bar coding equipment was taken out of the constraint level.
- The Building Management costs were redistributed countywide to reflect the first year's actual needs. The Sheriff's constraint was adjusted by \$300,000 to account for a decrease in costs.

MCSO Budget Request 1995-96
March 14, 1995

MCSO 1994-95 General Fund Allocation	\$41,965,099
Bar Coding carryover	(25,883)
Video Imaging equipment carryover	(30,897)
MDT Radio Training	(16,735)
Courthouse Security Indirect Support	(1,257)
Building Management adjustment	(300,000)
1995-96 General Fund Constraint	\$41,590,327

MCSO General Fund Budget Request	\$41,590,327
Difference	\$0

The Sheriff's Office budget comes within the general fund constraint; however, after the budget request was submitted, the Finance Division determined that the amount of payment on COP's (on MDTs and other equipment) will be approximately **\$135,000** higher than was previously estimated. The Sheriff's Office must budget for this cost which amortizes the borrowing used to purchase equipment ordered by the Sheriff's Office.

Budget Summary

Budget Trends	1993-94 Actual	1994-95 Current Estimate	1994-95 Adopted Budget	1995-96 Proposed Budget	Difference
Staffing FTE	701.54	709.69	706.44	737.28	30.84
Departmental Costs	\$51,578,011	\$53,174,832	\$56,286,984	\$57,710,255	\$1,423,271
Program Revenues	\$16,962,215	\$19,187,190	\$19,177,004	\$20,665,979	\$1,488,975
General Fund Support	\$35,550,021	\$33,987,642	\$38,050,998	\$38,078,099	\$27,101

Significant Changes

Resources

Expiration of ROCN grant	\$ (106,289)
Increased Inverness Jail Levy	1,695,639
Increase Metro contract revenue	83,283
Increase Alarm Permits, False Alarm fees	83,210
Increase Concealed Weapons permits fees	109,406
Increase Target Cities grant	251,061
Cut CCA Funding, DROP Bed contract (<i>see Issue 5</i>)	<u>(870,390)</u>
Significant Resource Changes	\$1,245,920

MCSO Budget Request 1995-96
March 14, 1995

Expenditures

Overall salary adjustments	\$ (284,006)
Jail Bed/Staffing Studies	50,000
New positions Executive Division (3.00)	140,579
Cut cost of Undersheriff	(106,289)
New Positions Enforcement Division (6.00)	289,396
New Positions Corrections Division (22.68)	1,220,814
Reduce cost of debt service	(175,000)
Reduce one time only EMT certification costs	(199,574)
Increase overtime for Training backfill	308,878
Reduce building management costs	(320,888)
Motor Pool increases	<u>122,219</u>
Significant Expenditure Changes	\$1,046,129

Add Packages Requested

1. Addition of one full time hospital post in the Hospital Security Unit, with increase in overtime.

Department Rank = 1

Cost = \$226,109 (ongoing)

Whenever an inmate in the custody of the Sheriff's Office has a serious medical condition and has to be treated at a local hospital, a corrections deputy is assigned to supervise the inmate. The 94-95 adopted budget for the Hospital Security Unit was severely underfunded. By providing one full time hospital post and additional overtime funding, this proposal will allow the Corrections Division to be better able to meet 95-96 budget objectives.

The assignment of inmates for treatment at local hospitals is beyond the control of the Corrections Division. Qualified health care providers working for the Health Department, Corrections Health and hospital physicians determine that the treatment for a sick or injured inmate can only be provided at a hospital. Depending on the nature of the illness or injury, an inmate may be sent to the Portland Adventist Medical Center for treatment. Often this is by ambulance and it is an emergency transport. It is not unusual for Emergency Medical Services to reroute these transports to other medical centers when emergency rooms are at capacity.

An analysis of the number of days that hospital units were staffed revealed that for the year 1994, hospital units were occupied for about 237 days, or 65% of the year. On many occasions more than one hospital unit was open at the time. Historically, the Corrections Division has been forced to carve the funding for this activity out of other overtime funds.

This proposal would fund 1.82 FTE Corrections Deputies and \$140,000 additional overtime expenditures.

Budget Office Recommendation

The addition of more staff and overtime would seem to offset some expenditures that the Sheriff's Office has been making for this purpose, whether or not those expenditures were budgeted. Until the net effect is determined, the cost or savings of this proposal is unknown.

2 Supplement Court Guards with Temporary Hires

Department Rank = 2

Cost = \$95,117 (ongoing)

Court Guards perform vital services by providing secure and timely movement of in-custody persons to and from courtrooms, maintaining order during proceedings, and taking custody of persons who turn themselves in and/or are ordered into custody by the judges. As docket numbers increase, it becomes more and more important to fully staff the Court Guards Unit so as to anticipate peak period needs.

As of this writing, MCSO is experiencing some delays, mostly on the days with large dockets, and/or numerous trials. In a recent month, 7 out of 20 court days showed delays. The delays averaged 7.38 minutes, with a high of 19 minutes. In that same month, 311 persons were taken into custody on book and keep activities, and each FTE handled 76 prisoners.

This proposal is for temporary hires, including fringe and insurance benefits.

Budget Office Recommendation

The Sheriff has proposed a new classification of Court Guard, which would be a lower pay level within the Deputy Sheriffs Association, and with a narrower scope of responsibilities than Deputy Sheriff. The Court Services Unit is staffed with Deputy Sheriffs in the 1994-95 budget, and in the Sheriff's proposed 1995-96 budget. Even assuming a transition time, if this new classification is put into place, it can be expected that there will be cost savings as a result. A cost savings of 6%-7% within the Court Guards (not including the Sergeants) will generate the amount needed for the temporary hires. I recommend using the salary savings for temporary hires, if needed.

3. Expand the existing video arraignment and conference capabilities to each floor of the Detention Center and MCCF.

Department Rank = 3
Cost = \$110,000 (\$10,000 ongoing)

Video arraignment and conferencing was first installed between two state facilities and courtroom #3 in 1989. It has proven extremely useful in reducing the total number of transports and assisting in successful arraignment of defendants who pose a security threat.

In 1991, the Sheriff's Office rerouted the video arraignment and conferencing equipment from Salem to MCIJ. They were successfully reducing transports from two state facilities. However, MCSO felt that they could further reduce the numbers by moving the equipment. The video arraignment and conferencing equipment is currently utilized to its maximum.

The video system has received high praise from judicial staff, doctors, probation staff, attorneys and inmates themselves. Once the system was in place and operating smoothly, the Sheriff's Office conducted a system satisfaction study. They found that approximately 75% of the inmate population would prefer to have their arraignment by video and that approximately 75% would consent to future appearances by video. 50% of the inmate population would prefer to have attorney, program staff, etc. conferences by video.

3,236 video arraignments were conducted in 1994. With the expansion of the existing equipment, the Sheriff's Office could better utilize existing facilities and personnel.

Budget Office Recommendation

The video arraignment equipment is also expected to relieve the number of transports of juveniles from MacLaren in Salem to Multnomah County for the required monthly hearings. I recommend that the equipment be purchased using COP's, with a five year payment of \$23,901 each year.

4. Provide Assessment and Movement of Booked Inmates for Transfer to Medium Security Facilities by Adding one 7 day per week post of Corrections Deputies to the Classification Unit

Department Rank = 4
Cost = \$86,109

When the Classification Unit was established, a limited number of transfers (10 to 20 per day) were made to MCCF. All transferred inmates were assessed and selected by Classification for transfer. Currently as many as 80 transfers may occur each day straight from booking to CHJ, MCIJ and MCCF with only a cursory check of current charge by Deputies staging inmates for movement. This add package brings back some assessment, data gathering, and order to the transfer process, enhancing knowledge of who is moved and enabling us to make the safest choices possible.

In January 1995, 3,334 inmates were booked into the MCDC. The reception floor of MCDC was designed to temporarily hold newly booked inmates until their initial court appearance, and has only 44 beds. As a result of high volume and low capacity at reception, most inmates must be moved out of reception within the first day of their arrest to make room for the steady stream of new bookings. The classification process was designed to occur after initial court appearance when only inmates who would be staying in the system would receive an interview, background check and data entry that results in their safe placement in a bed off the reception floor. However, as bookings have increased, there has been an accelerated movement of inmates throughout the system. The lowest turnover rate occurs at MCDC where inmates with the most severe charges, behavior and mental status are held. This means that there is a nearly continuous movement of inmates from booking to medium security facilities in order to fill the constantly vacating beds.

This proposal is for 1.82 Corrections Deputies, one seven day a week post.

Budget Office Recommendation

This responsibility comes at the front end of the jail and/or release system, the point at which a bottleneck has developed. It seems that, along with the review of the various release and supervised release programs, this program should be temporarily funded.

5. Provide Alternatives to Jail Bed Space by:

Enhancing the Pretrial Release Supervision continuum by providing supervision of the defendants released due to the population cap (Matrix);

Providing electronic monitoring equipment available for selected persons released on supervised pretrial release;

Continuing the Work in Lieu of Jail program which began with Inmate Welfare Funding in January 1995.

Department Rank = 5
Cost = \$179,135 Supervision
65,000 Electronic Monitoring
46,480 Work in Lieu of Jail
\$290,615

Each month the Sheriff's Office is forced to release both pretrial defendants and sentenced inmates due to a lack of jail beds. The Pretrial Release Supervision continuum lacks several key elements that, if in place, could result in reduced matrix releases, improved FTA rates, and improved community protection. The Work in Lieu of Jail Program provides an alternative to jail bed space for inmates serving weekend sentences.

This proposal provides five Corrections Technicians to supervise between 300-500 pretrial matrix released defendants in the community. These technicians would supervise the defendants and would better ensure their appearance in court. If the staff feel that the defendant has violated the conditions of his release and is a danger to the community, a warrant would be sought from the court.

In addition, the proposal provides approximately 20 electronic monitoring bracelets that would be used for defendants who are not being released due to a lack of 24 hour type of house arrest supervision. With the availability of bracelets, additional defendants could be released to the existing supervision programs.

The proposal would also add overtime for a Corrections Deputy two days a week to supervise up to 12 inmates on a work crew.

Budget Office Recommendation

The first two proposals should be reviewed along with the other release and supervised release proposals.

The Work In Lieu of Jail Program is currently in place for 1994-95. If the program is successful it should be continued.

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6. Add 3 Sheriff's Office Technicians to provide expedient and accurate computer entry of video image and booking related information on newly arrested persons.

Department Rank = 6

Cost = \$98,481

Accurate computer entry of booking related information is a critical process. This process affects many other critical functions related to the overall booking, such as property control, medical screening, recog interviews and identification of true names. Booking information must be entered expediently in order to meet demands put on an overcrowded facility and generally manage the inmate population. This add package will address the current problems with timeliness, data entry errors and tort claims.

The proposal includes 3 Sheriff's Office Technicians.

Budget Office Recommendation

The IACP Operational Audit, completed in February 1995, suggests that coordination or consolidation between the Enforcement Records Unit and the Corrections Records Unit could improve efficiency. Once the recommended staffing/workload study has been completed, the Sheriff's Office will have a better idea of the organizational requirements. It is premature to approve this add at this time.

7. Provide 1 Additional Staff Position within the Jail Intervention Program

Department Rank = 7

Cost = \$43,004 (\$42,258 ongoing)

The In Jail Intervention Program is a part of a cooperative agreement between the federal government, the state of Oregon, and Multnomah County. The program is funded for 5 years by the Center of Substance Abuse Treatment. Its primary goals are to increase access to substance abuse treatment, improve treatment outcomes, and promote system wide coordination. This is a 14 day pre-treatment program which services 16 women and 32 men. The current 5 staff are responsible for full assessments on every program participant (average 25 weekly), 9 groups daily, and referral and case management and tracking for all participants. The current staff are not able to adequately provide these services, without compromising the goals of the project.

This proposal includes 1 Alcohol and Drug Evaluation Specialist, furniture, supplies and telephone.

Budget Office Recommendation

The Target Cities project is a pilot project funded with federal dollars over a five year period. The project should be operated with grant funds for the five years to determine the success of the program. The project, if successful, will probably become a general fund program, and should not be expanded at this time.

8. Increased Training for Operational and Staff Development

Department Rank = 8
Cost = \$238,044

In their report to the Board of County Commissioners, the International Association of Chiefs of Police recommended, "Expand and improve training (particularly in-service training) for all MCSO staff, both sworn and non-sworn. Seek additional resources and fund to expand training in critical areas. Use training opportunities in a cost-effective manner to improve staff performance in identified areas of expertise, using previously indicated TQM approaches."

The Sheriff's Office has established benchmarks for employee in-service training based upon ACA Accreditation standards for Corrections Deputies of 40 hours per year. Similarly, a 40 hours per year benchmark standard has been established for Deputy Sheriffs based upon Portland Police Bureau requirements for in service training for their officers. Non-sworn employees have a benchmark standard of 20 hours per year.

In the 1995-96 request, the Sheriff's Office has increased overtime by \$275,000 in Corrections and \$75,000 in Enforcement, which will place them at 63% of budget needs for in-service training.

This proposal includes overtime funding.

Budget Office Recommendation

With Multnomah County's awareness of the need to increase training to employees to enable them to provide better service, the 1995-96 budget requests reflect a higher level of training within the baseline budgets. The Sheriff's Office has budgeted more dollars for training and overtime for next year, but it will take time to bring the budgets fully in line with the target for training needs. I would recommend no further additions to the training budget at this time.

Issues for Discussion

1. Transition of Authority for State Corrections Funds to Local Governments

Governor Kitzhaber is recommending a transition of authority and administration for community corrections funds from state to local government. Also, as part of his 95-97 budget, the Governor is setting aside funds to deal with the impact of Measure 11 on local correctional systems. If approved in this session, funds to construct local correctional facilities will be available for application as early as August.

The Governor's budget direction is based on his philosophy that local correctional programs reduce recidivism to a greater degree than programs administered in

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state prisons. The Public Safety Transition Team has also advised the Governor that funding invested in local programs will have greater long term benefits. This is important to Multnomah County and will have major implications in the funding levels for correctional services and facilities and the process through which funds are allocated.

2. Court Guards

In 1994, the Sheriff's Office explored the opportunity to create a position which would serve the needs of the court system in prisoner movement and courtroom security, but not require the degree of skill necessary for a "generalist" deputy sheriff. This position would be a lesser included position of deputy sheriff and would be a member of the Deputy Sheriff's Association. The employees would be BPSST certified and meet the eligibility requirements of a Deputy Sheriff. Transition would be through employee attrition in the deputy sheriff classification.

As a part of the 1995-96 budget request, the MCSO has funded three deputy positions for a warrant service unit. This action was a result of an IACP operational analysis recommendation. It is our intention to accomplish this by creating three "court services" deputies and moving three deputy sheriff positions out of court services to serve warrants. Budget adjustments will be made upon identification of pay scale.

3. Assess and implement recommendations made in the Multnomah County Auditor's overtime study and the operational analysis conducted by the International Association of Chiefs of Police (IACP).

During FY 1994-95, the Sheriff's Office agreed to undergo an operational analysis to make certain staffing and funding recommendations regarding the Sheriff's Office. Sequentially with that the Sheriff's Office requested an audit of corrections overtime to identify opportunities to better schedule staff and overtime. As a result of this analysis, the Sheriff's Office has a framework in order to assess and re-engineer a number of operational aspects of the agency.

In their overtime audit, the auditor's office identified the need for a scheduling unit in order to monitor all corrections vacancies and ensure every vacancy alternative is analyzed prior to using overtime for a replacement. In addition, the development of a scheduling software package was suggested for efficiency in employee scheduling and tracking.

Soon after the overtime analysis, the IACP operational analysis was released. This document made 46 recommendations for analysis and restructuring. In many ways, this was a framework document for subsequent evaluation, both internally and through the use of technical assistance.

The Sheriff's Office acknowledges that the potential impact of this analysis is resource intensive. Therefore our analysis will be structured to implement the most critical issues immediately, then work to incrementally implement the recommendations based upon available funding and county priorities. In our 1995-96 budget request, we have funded the following items relevant to these recommendations:

- Scheduling Unit including software development
- Warrant Service Unit
- Administrative Analyst in Planning & Research
- Increased training budget

4. Assessing the needs of fire districts in areas of Multnomah County and establishing public safety policy to the residents.

With the conversion of fire dispatching to the new 911 system, and the requirement for 800 MHZ radios, a cost burden has been placed on the Sauvie Island and Corbett Fire Districts which they may not be able to bear. In FY 1994-95, the Board agreed to provide \$1,000 toward Sauvie Island's BOEC costs with the Portland Fire Bureau (PFB) providing an equivalent amount. The Board also instructed the Sheriff's Office to monitor the situation in the Corbett area and report back in the event they faced a similar problem.

5. Loss of revenue from Community Corrections funds, including \$512,400 to fund 28 beds for the DROP program.

The Department of Community Corrections has not budgeted the cost of the DROP contract in their 1995-96 budget request. In the 1994-95 the 28 DROP beds were contracted at the Courthouse Jail, which freed up funding for the Sheriff to open more beds at MCRC. Are the beds currently budgeted at MCRC being used?

The other piece of the Community Corrections money, \$357,990, was support for 17 beds at MCRC. The contribution, a combined total of \$870,390, becomes an issue of how does the general fund absorb the lost revenue.

cc: Beverly Stein, County Chair
John Bunnell, Sheriff
Bill Farver, Chair's Executive Assistant
Joan Pasco, Sheriff's Executive Assistant
Larry Aab, Sheriff's Fiscal Officer
Meganne Steele, Staff Assistant
Dave Warren, Budget & Quality Office



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TO: Barry Crook, Budget and Quality Manager
FROM: Ching Hay, Budget Analyst *CH*
DATE: April 17, 1995
SUBJECT: Budget Analysis of Citizen Involvement Committee's 1995-96 Request

1. Constraint Discussion

CIC's constraint is \$159,531 which is arrived at by adding \$5,500 to their adopted budget because they underbudgeted for personnel this year. Their budget request is for \$159,531, which meets their constraint.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94 Actual</u>	<u>1994-95 Current Estimate</u>	<u>1994-95 Adopted Budget</u>	<u>1995-96 Proposed Budget</u>	<u>Difference</u>
Staffing FTE	3.00	3.00	3.00	3.00	0.00
Personal Services	127,700	139,466	135,196	146,825	\$11,629
Contractual Services	77	0	0	0	0
Materials & Supplies	19,691	18,835	18,835	12,706	(6,129)
Capital Outlay	0	0	0	0	0
Total Costs	\$147,468	\$158,301	\$154,031	\$159,531	\$5,500
Program Revenues	0	0	0	0	0
General Fund Support	\$147,468	\$158,301	\$154,031	\$159,531	\$5,500

3. Significant Changes

Personal Services has increased by about \$11,500. Half is due to underbudgeting for 1994-95 and the remainder can be attributed to merit and COLA increases for next year.

Printing has gone down by \$4,500 from \$5,427 to \$890.

4. Add Packages

Add package #1 requests for \$7,110 to restore current service level funding for materials and supplies. Alternatives are to reduce staffing in order to find additional resources or shut down the CIC. CIC's personnel costs have increased as a result of merit increases and underbudgeting in 1994-95. For 1995-96, personnel costs will increase by about \$11,500. I recommend approval of this add package so that the CIC will be able to function at the same level as before.

Add package #2 requests for \$4,000 one time to fund the development of a strategic 5 year plan for the CIC. Alternatives are to develop the plan in-house or to do nothing. I believe that this project can be done in-house by a group of interested citizens with staff support and with minor support for materials. However, I have been informed by John Legry that CIC has already put many pieces together but to finalize it, they require a facilitator to pull different political factions together. I recommend approval of this add package's concept although cost appears to be high.

Add package #3 requests for an ongoing \$7,000 to increase the availability of CIC publications to reach more households. Ideas floated around include This Week supplement, bulk mail one time with survey of publication's usefulness returned to CIC with future mailings to those who have returned survey, cable TV production about possibilities for citizen involvement, etc. I recommend approval of it at least for the first year since Bev Stein mentioned that the County needs to advertise its good deeds better.

Add package #4 requests for an ongoing \$50,000 to fund a grant fund to be used to develop partnerships with willing volunteers with ideas to benefit the general community. Alternatives are to work with existing departments in developing these partnerships, have CIC inform citizens that grants may be available, or to do nothing. I recommend that the CIC further develop the grant fund concept such as developing guidelines for grant approval and getting a few proposals to see what ideas are out there, etc. Citizens with good ideas could approach the Board for funding through contingency requests.

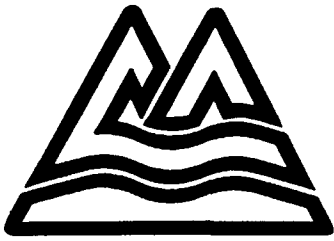
5. Issues for Discussion

Role of the CIC in involving and informing the public of Multnomah County.

6. Budget Office Recommendations

The CIC is a citizen based organization and should be given adequate but not extravagant support. I feel that CIC should look not just at in-house paper publications but piggy back through neighborhood group publications, the Library, and develop electronic means of informing the public of what is going on at the County. Publicizing the good deeds of Multnomah County will hopefully help in the long run in turning around some of the negative opinions people show towards government.

c John Legry, CIC



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TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of Multnomah Commission on Children and Families 1995-96 Request

1. Constraint Discussion

MCCF's General Fund constraint is \$24,443 which is their Indirect and Building Management Lines. Their request of \$225,277 with fed/state revenues of \$200,834, has met the constraint.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94</u> <u>Actual</u>	<u>1994-95</u> <u>Current</u> <u>Estimate</u>	<u>1994-95</u> <u>Adopted</u> <u>Budget</u>	<u>1995-96</u> <u>Proposed</u> <u>Budget</u>	<u>Difference</u>
Staffing FTE	0.00	4.00	4.00	3.38	(0.62)
Personal Services		\$203,607	\$203,607	\$177,713	(\$25,894)
Contractual Services		3,000	3,000	5,000	2,000
Materials & Supplies		24,218	24,218	42,564	18,346
Capital Outlay		<u>5,000</u>	<u>5,000</u>	<u>0</u>	<u>(5,000)</u>
Total Costs	\$0	\$235,825	\$235,825	\$225,277	(\$10,548)
Program Revenues	\$0	\$232,862	\$232,862	\$200,834	(\$32,028)
General Fund Support	\$0	\$2,963	\$2,963	\$24,443	\$21,480

3. Significant Changes

There is a reduction of 0.625 FTE Program Development Specialist. Building Management of \$15,841 is being budgeted for the first time. Reduction of Fed/State revenues by \$32,028.

4. Add Packages

MCCF has one add package requesting for \$31,866 to restore 0.65 FTE Program Development Specialist. This position is currently vacant. This reduction will result in not staffing 2 committees, and less capacity in developing relationships with stakeholders. An alternative is to get a staff person from CFS. I recommend exploration of the possibility of getting a staff person from CFS, and not backfilling fed/state revenue reductions.

5. Issues for Discussion

The main issue for discussion appears to be revenues and their allocation. MCCF is responsible for disposition of state fund grants to it, such as Child Care Development Block Grant, Great Start, Juvenile Justice, and Student Retention Initiative revenues. MCCF is responsible for the entire amount, not just the administrative portions of those revenues. CFS, however, appears to be in control of all portions of these revenues. It appears that CFS is making the decisions as to what they are giving to MCCF. A collaborative effort is needed.

6. Budget Office Recommendations

I recommend a look into CFS administration to see if there is a possibility of a staff person transferring over to MCCF. That would reduce the need for any General Fund contributions other than for Building Management and Indirect Costs.

c Helen Richardson, MCCF



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TO: Barry Crook, Budget and Quality Manager
FROM: Ching Hay, Budget Analyst *CH*
DATE: April 17, 1995
SUBJECT: Budget Analysis of Metro Human Right's 1995-96 Request

1. Constraint Discussion

MHRC's constraint is \$121,535, the 1994-95 adopted budget. Their request is for \$121,535 so they have met the constraint.

2. Table of Budget Facts

<u>Budget Trends</u>	<u>1993-94 Actual</u>	<u>1994-95 Current Estimate</u>	<u>1994-95 Adopted Budget</u>	<u>1995-96 Proposed Budget</u>	<u>Difference</u>
Staffing FTE	0.45	0.50	0.50	0.50	0.00
Personal Services	12,684	15,237	15,237	14,826	(\$411)
Contractual Services	0	0	0	0	0
Materials & Supplies	103,202	106,298	106,298	106,709	411
Capital Outlay	0	0	0	0	0
Total Costs	\$115,886	\$121,535	\$121,535	\$121,535	\$0
Program Revenues	0	0	0	0	0
General Fund Support	\$115,886	\$121,535	\$121,535	\$121,535	\$0

3. Significant Changes

There are no significant changes.

4. Add Packages

MHRC's add package #1 requests for an ongoing \$3,200 for continuation of the Dynamic Differences anti-bigotry program. One alternative are to reduce the program to what current volunteers are willing to present, and as they resign, they will not be replaced. The second alternative is to drop the program entirely and hope that the trainers will continue on their own. I recommend approval of this add package because this course has received high marks from people who have attended it and is gaining in reputation. This is shown by the waiting list of people wanting to attend the class. In addition, this add package brings Multnomah County closer to the 40% support specified in the intergovernmental agreement with the City.

MHRC's add package #2 requests for one time \$5,000 pass through funds to the Northwest Coalition Against Malicious Harassment (NWCAMH), a regional organization of smaller ones with representation in Idaho, Montana, Oregon, Washington, Wyoming and Colorado. A similar request has also been submitted to the City. The requested funds will be used for a conference to be held in Portland later this year. An alternative would be to provide approximately 3 months of staff assistance to help in putting the conference together. A second alternative would be to allow some employee time to provide support. Multnomah County provides 0.5 FTE to MHRC. If MHRC is willing, this employee should be able to help out with the conference. I recommend approval of this one time request if this has been past practice in other conference states, and contingent on NWCAMH making formal requests for funds from the surrounding communities such as Clark and Washington Counties. The City of Grants Pass might also be willing to put up something since there is organization of white supremacists going on. This will help make it a regional event.

5. Issues for Discussion

There is a group in Grants Pass that is trying to recruit 'thousands' of Oregonians to join them in having the Northwest become a White homeland. MHRC is working with police, anti-bigotry coalition, etc. MHRC would like to discuss what they are doing.

Immigration reform is a hot topic in light of Proposition 187 in California and subsequent discussions in Congress and elsewhere. MHRC is planning to take a resolution before the Board and working on providing training or organizing events for informing the public on immigration issues.

6. Budget Office Recommendations

I recommend approval of the add packages with the guidelines as stated above.

c Helen Cheek, MHRC



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TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of OSU Extension's 1995-96 Request

1. Constraint Discussion

OSU Extension's 1995-96 constraint is \$172,432, the 1994-95 adopted budget amount less \$8,000 for one time telephone upgrades. OSU is requesting for \$172,432 and therefore meets the constraint.

2. Table of Budget Facts

<u>Budget Trends</u>	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	<u>Difference</u>
Staffing FTE	0.00	0.00	0.00	0.00	0.00
Personal Services	0	0	0	0	\$0
Contractual Services	0	0	0	0	0
Materials & Supplies	140,478	180,432	180,432	172,432	(8,000)
Capital Outlay	0	0	0	0	0
Total Costs	\$140,478	\$180,432	\$180,432	\$172,432	(\$8,000)
Program Revenues	0	0	0	0	0
General Fund Support	\$140,478	\$180,432	\$180,432	\$172,432	(\$8,000)

3. Significant Changes

There are no significant changes.

4. Add Packages

OSU Ext.'s add package #1 requests for one time \$11,000 for improvements to the Extension Education site, a County owned building, although not maintained by DES Facilities. Main items covered are: repainting the interior of the building, re-carpet the main floor area, and landscaping the Center to perform as a demonstration site of wise water use. There is also a need to install a wheelchair accessible sidewalk. A partial alternative would be to have the Sheriff's work crews do some landscaping. However, with cutbacks, they have not been available. I do not recommend approval of this add package. The County is already providing rent free facilities. However, OSU Extension should try again to get work crews to provide landscaping services.

Add package #2 requests for \$20,000 to install LAN for the Multnomah County Extension Center. This LAN enables data transmission capability from each faculty and staff member's workstation and puts the knowledge of the University system at their fingertips. OSU has committed resources for one workstation and network software to link the Center to the Oregon State System of Higher Education Data Network. Requested is:

- one time cost of \$12,000 for upgrading 5 older PC's (8088 & 286) to current technology and task software for word processing, spreadsheet, and other functions on the LAN.
- A continuous cost of \$8,000 annually to provide support service and maintenance of the system.

I do not recommend approval of this add-package. The County's ISD might be able to help the Extension Service upgrade their computers with 386 or older 486 computers that are no longer needed at a substantial discount. In addition, I do not feel that the County should be responsible for maintaining the LAN.

5. Issues for Discussion

4-H colors. This is a new experimental program designed to teach youth more about themselves and others. The program has three main levels of participation focused to individual, group understanding, and leadership. After the program, participants will hopefully understand their importance in being part of a team and how differences enhance a group's effectiveness.

Partnership with PSU and OHSU to initiate learning opportunities for students through the Albina community Outreach Partnership Center. If funded by HUD, the partnership plans to address many action steps in the Albina Community Plan through

- Adult and Youth learning projects
- Information sharing and technical assistance
- Mentoring projects with neighborhood residents
- Job preparedness activities
- Orientation and training activities
- Interdisciplinary faculty development workshops

Should Multnomah County continue funding OSU Extension, given that there is increasing pressure on the General Fund with state cutbacks, etc.

6. Budget Office Recommendations

I do not recommend approval of any add packages.



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PHONE (503) 248-3883

TO: Barry Crook, Budget and Quality Manager

FROM: Ching Hay, Budget Analyst *CH*

DATE: April 17, 1995

SUBJECT: Budget Analysis of PMCoA's 1995-96 Request

1. Constraint Discussion

The constraint for PMCoA is \$70,768. The constraint is arrived at by adding \$11,640 to this year's adopted budget. This amount is coming from Aging Services. PMCoA's request of \$70,768 is at constraint.

2. Table of Budget Facts

Budget Trends

	1993-94	1994-95	1994-95	1995-96	
	<u>Actual</u>	<u>Current</u>	<u>Adopted</u>	<u>Proposed</u>	<u>Difference</u>
Staffing FTE	0.00	0.00	0.00	0.00	0.00
Personal Services	0	0	0	0	\$0
Contractual Services	0	0	0	0	0
Materials & Supplies	57,406	59,128	59,128	70,768	11,640
Capital Outlay	0	0	0	0	0
Total Costs	\$57,406	\$59,128	\$59,128	\$70,768	\$11,640
Program Revenues	0	0	0	0	0
General Fund Support	\$57,406	\$59,128	\$59,128	\$70,768	\$11,640

3. Significant Changes

\$11,640, previously budgeted in Aging Services, is now budgeted in PMCoA. There is no issue here as long as Aging Services and PMCoA are in agreement that this is appropriate.

4. Add Packages

PMCoA is requesting to add \$7,531 to maintain current service level. They are also requesting for an additional \$5,058 from the City. Instead of giving PMCoA \$7,531 of general fund money, I recommend adding \$3,750 of General Fund money with matching title XIX funds from Aging Services. However, we will need to discuss this issue with Jim McConnell to see if this is a possibility. Jim is out of town till March 2nd and I will attempt to call him before the meeting to see if he is agreeable to this arrangement.

5. Issues for Discussion

- Services that could be reduced or cut as a result of the City/County not providing additional funds.
- Plan for recruiting for 287 volunteers to participate in PMCoA activities with emphasis on public services, multi ethnic access, senior center development, adult foster care, and subsidized housing.

96SALSAV.XLS

	PS All Funds	PS GF	Salary Savings	GF Savings	% of PS All	% of PS GF	
CFS	14,832,696	0	171,844	0	1.16%	0.00%	
Health	43,267,154	6,064,367	150,000	69,000	0.35%	1.14%	Underbudgeted
Aging	8,043,336	887,762	20,000	20,000	0.25%	2.25%	Attributed
Juvenile Justice	10,278,106	8,458,453	0	0	0.00%	0.00%	
Sheriff	45,549,210	33,170,959	0	0	0.00%	0.00%	
DCC	15,907,202	2,767,010	403,175	70,683	2.53%	2.55%	
DA	10,166,793	8,355,257	0	0	0.00%	0.00%	
Library	13,165,258	0	342,613	0	2.60%	0.00%	
DES*	30,885,114	12,068,571	NA	100,607	0.00%	0.83%	GF and A&T
Finance	2,449,719	2,427,076	28,520	28,520	1.16%	1.18%	
Employee Svcs	1,057,605	752,748	0	0	0.00%	0.00%	
Labor Relations	235,375	235,375	0	0	0.00%	0.00%	
Budget	666,442	666,442	6,968	6,968	1.05%	1.05%	
Affirmative Action	164,340	164,340	0	0	0.00%	0.00%	
County Counsel	1,086,576	506,494	17,982	17,982	1.65%	3.55%	
Emergency Mgmt	154,248	0	0	0	0.00%	0.00%	
Risk Mgmt	413,500	0	0	0	0.00%	0.00%	
Total	198,322,674	76,524,854	1,141,102	313,760	0.58%	0.41%	

DES GF includes A&T Fund

	88-89	89-90	90-91	91-92	92-93	93-94 (as of 9/17)	Average Savings
Total General Fund							
Budget	57,702,581	62,726,652	68,858,878	68,133,253	67,548,302	69,142,342	
Actual	56,719,355	62,345,185	65,048,267	67,063,351	66,987,858	68,405,255	
Savings	983,226	381,467	3,810,611	1,069,902	560,444	737,087	1,257,123
% Savings	1.70%	0.61%	5.53%	1.57%	0.83%	1.07%	1.89%

MSS SALARY SAVINGS

MSS SALARY SAVINGS	88-89	89-90	90-91	91-92	92-93	93-94	Average Savings				95-96
Finance											
Budget	743,002	813,439	1,047,782	1,114,026	2,081,602	2,280,896					2,427,076
Actual	717,645	800,719	999,499	1,071,229	2,068,142	2,190,504					
Savings	25,357	12,720	48,283	42,797	13,460	90,392	38,835				28,520
% Savings	3.41%	1.56%	4.61%	3.84%	0.65%	3.96%	3.01%				1.18%
Employee Services											
Budget	591,670	498,179	650,967	621,769	677,433	711,280					752,748
Actual	515,753	494,028	594,303	590,929	664,962	706,642					
Savings	75,917	4,151	56,664	30,840	12,471	4,638	30,780				0
% Savings	12.83%	0.83%	8.70%	4.96%	1.84%	0.65%	4.97%				0.00%
Labor Relations											
Budget	132,429	166,522	183,978	187,489	206,655	220,196					235,375
Actual	137,490	166,139	183,441	190,024	200,166	214,104					
Savings	(5,061)	383	537	(2,535)	6,489	6,092	984				0
% Savings	-3.82%	0.23%	0.29%	-1.35%	3.14%	2.77%	0.21%				0.00%
Budget & Quality											
Budget	506,235	534,781	560,280	418,086	480,885	488,736					666,442
Actual	450,517	520,969	505,123	415,539	469,417	457,573					
Savings	55,718	13,812	55,157	2,547	11,468	31,163	28,311				6,968
% Savings	11.01%	2.58%	9.84%	0.61%	2.38%	6.38%	5.47%				1.05%
County Counsel											
Budget	634,586	728,626	792,017	543,661	455,519	507,258					506,494
Actual	614,904	632,548	739,042	494,569	471,613	511,210					
Savings	19,682	96,078	52,975	49,092	(16,094)	(3,952)	32,963				17,982
% Savings	3.10%	13.19%	6.69%	9.03%	-3.53%	-0.78%	4.62%				3.55%
Summary											
								75%	50%		
Budget	2,607,922	2,741,547	3,235,024	2,885,031	3,902,094	4,208,366					4,588,135
Actual	2,436,309	2,614,402	3,021,408	2,762,290	3,874,300	4,080,033					0
Savings	171,613	127,145	213,616	122,741	27,794	128,333	131,874	98,905	65,937		53,470
% Savings	6.58%	4.64%	6.60%	4.25%	0.71%	3.05%	4.31%	3.23%	2.15%		1.17%
Last 3 Years											
Budget				2,885,031	3,902,094	4,208,366					
Actual				2,762,290	3,874,300	4,080,033					
Savings				122,741	27,794	128,333	92,956	69,717	46,478		
% Savings				4.25%	0.71%	3.05%	2.67%	2.00%	1.34%		
Lowest % of Each Division (no negatives)											
Budget	743,002	166,522	183,978	418,086	2,081,602	711,280					
Actual	717,645	166,139	183,441	415,539	2,068,142	706,642					
Savings	25,357	383	537	2,547	13,460	4,638	7,820				
% Savings	3.41%	0.23%	0.29%	0.61%	0.65%	0.65%	0.97%				



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TO: Beverly Stein
Bill Farver

FROM: Keri Hardwick, Budget Office

DATE: April 17, 1995

SUBJECT: Information Systems Follow Up

This memo and the attached spreadsheet were prepared in response to questions raised in the initial budget meeting with Chair Stein. ISD provided most of the technical details, and the departments identified planned expenditures and initiatives. *(For purposes of this memorandum, "department" refers to departments, divisions and non-departmental programs as listed in the table below.)* The following should be viewed as an overview of Multnomah County information systems.

Overview of County Systems

Multnomah County has one mainframe computer, six mid-range systems and approximately 2000 personal computers (PC's). We have 30 Local Area Networks (LANs) with over 1,000 nodes. A node is generally a PC or a printer, but may be another device. Our systems have interfaces to a variety of external entities, including computers at the State, the City of Portland and educational institutions.

We have 32 major applications running on the County's mainframe, ranging from the Sheriff's Office Records Management system (1674 users) to the Accounting System (113 users). The Health Department runs their mainframe applications on the OHSU computer, several social service divisions use the State Department of Human Resources mainframe applications, and DCC uses the State Department of Corrections mainframe.

Our mid range systems are found in the Sheriff's Office (2), Assessment & Taxation, the Library, Elections and FREDS, and run applications such as DYNEX (Library operations), MAINSTEM (Fleet maintenance) and X-Image (inmate photo images).

We are beginning to see applications which take advantage of local area network capabilities, such as Applicant Processing and Facilities Management. A large variety of personal computer applications are also being run. The most prevalent are word processing, spreadsheet and database programs.

Budgeted Expenditures

The departments have identified over fourteen million dollars in data processing expenditures within constraint, for all funds. This includes all expenditure categories, details can be found on the attached spreadsheet. The FTE's identified are for those individuals whose primary job responsibilities are programming, technical support or database development and administration. It does not include detail of the hours spent by those employees who provide support but for whom this is not their primary job. These

figures are primarily for computer-related data processing, and do not include other electronic information systems such as telephones and video. It is critical to consider each department's operations separately, and consider what they have, what they are doing, why (mandates) and how they are doing it, what technological tools and support they need to do it, and how well those needs are being met. The operations differ greatly, so across the board generalizations about levels of support and spending necessary are not credible.

Significant planned expenditures within constraint, and requested add package items are identified by department in the table below.

Department	Within Constraint	Add Package(s)
Aging Services	<ul style="list-style-type: none"> Working with State to equip field offices in 1994-95 (Approx. \$400,000). \$54,000 for equipment purchases and upgrades. 	<ul style="list-style-type: none"> \$9,300 for computers in Adult Housing Add Pkg.
Community Corrections	<ul style="list-style-type: none"> Migration to "client-server" technology, coordinated with State DOC in 1994-95. Continuation of efforts begun in 1994-95. Further expansion of LAN/WAN \$148,374 for equipment purchases and upgrades 	<ul style="list-style-type: none"> 5 FTE (\$220,900) to continue positions funded by State in 1994-95 for development and support of new system.
Community & Family Services	<ul style="list-style-type: none"> New Data Systems Administrator for centralized MIS. New Data Analyst for Managed Care 4 positions (\$204,019) are for grant-specific projects. \$78,705 for equipment purchases and upgrades. \$50,000 within DPMC constraint for coordinated database development 	<ul style="list-style-type: none"> 3 FTE (\$119,599) and related M&S/Equipment (\$82,254) to create Centralized MIS Unit. 1 FTE (\$44,877) within Managed Care Add package.
District Attorney	<ul style="list-style-type: none"> \$130,000 for equipment purchase and upgrade 	None
Environmental Services (Excl. ISD)	<ul style="list-style-type: none"> \$304,000 for equipment purchase and upgrades (entire department). \$35,000 additional contractor support for implementing strategic plan \$10,000 in Planning to develop automation requirements. .50 FTE (22,554) for LAN admin in Facilities (shared w/Finance) \$40,000 for records imaging equipment in Transportation. \$52,700 first year payment on mapping system upgrade in A&T. \$105,400 first year payment on imaging/cashiering system in A&T. 	<ul style="list-style-type: none"> \$3,425 for software/hardware in Records Mgmt Add Package.
Health	<ul style="list-style-type: none"> 2nd third of transition from "dumb" terminals to PC's. \$122,682 (Equip) and \$88,175 (Internal Svcs) for equipment purchases, upgrades and wiring. It is also likely that some portion of Supplies (\$341,004) are for equipment items below the \$2,000 capital limit. 	None

Juvenile Justice	<ul style="list-style-type: none"> • \$122,000 Casey Foundation funding for document imaging system. • Hardware and software for 3 LAN's in District Offices • \$39,144 (Equip) and some portion of \$177,292 (Supplies) for equipment purchase and upgrades. 	None
Library	<ul style="list-style-type: none"> • \$154,600 for equipment purchase and upgrades (excluding grant programs) • \$30,000 grant funding to develop Children's CD-ROM Centers • \$3,050 grant funding for desktop publishing equipment 	<ul style="list-style-type: none"> • 1.5 FTE (\$52,387) and associated M&S/Equip. costs (\$213,064) to provide better access for public and staff to information resources. Includes 70 PC's and printers to replace "dumb" terminals for public use. • \$19,905 for automated staff substitute finder • \$48,834 for kiosk
Mgmt Support/Elected Officials	<ul style="list-style-type: none"> • .50 FTE (22,554) for LAN admin at Ford Bldg (shared w/ Facil.) • \$44,300 for equipment purchase/upgrades 	<ul style="list-style-type: none"> • 1 FTE (44,930) and related M&S (\$6,424) for LAN admin/PC support in Portland bldg. • \$3,000 for computer in RESULTS/Training Add Package
Sheriff's Office	<ul style="list-style-type: none"> • \$310,000 within DPMC constraint for continuing work on SWIS system. • \$73,765 (Prof Svcs) for development of scheduling system • \$164,687 for equipment purchase and upgrades. 	None
Multiple Departments	<ul style="list-style-type: none"> • Wide Area Network (WAN) implementation to begin 1994-95 • \$317,000 within DPMC constraint for: Community Info System (\$60,000) Graphical User Interface/ Download of Mainframe Data (\$30,000) "Infrastructure" (\$227,800) • Working on grant funding for expansion of community information project. 	<ul style="list-style-type: none"> • \$200,000 for expansion of projects funded within DPMC constraint: Community Information system (\$60,000); CFSD Integrated database (\$50,000); Mainframe download (\$90,000). • \$522,200 for "infrastructure" development
ISD	<ul style="list-style-type: none"> • New CPU for mainframe (\$350,000 total, \$29,193 first year) 	None

Issues to Consider

There has been considerable discussion about the roles of the various committees (DPMC, DPMC Op. Staff, SPIT) in reviewing and making recommendations regarding budgeted projects for 1995-96. We are absolutely in a state of flux regarding both our overall strategic direction and in the roles and responsibilities which follow. Our historic practice has been:

1. An amount is determined to be the "New Development" constraint figure from the General Fund.
2. Departments submit projects to the DPMC that they would like considered for the New Development funding. Historically, these have tended to be program-specific, mainframe applications.

3. The DPMC Operating Committee reviews the projects and provides a recommended ranking to the DPMC.
4. The DPMC reviews that recommendation and submits their recommendation to the Chair & BCC.
5. Other "major" projects, funded through different ways, are also reviewed by the DPMC throughout the year. However, the DPMC does not serve a project oversight function.

There were several interesting developments which affected the recommendations for 1995-96: the creation of SPIT, and the availability of technological add package funding. For the first time, DPMC moneys have been recommended for County-wide initiatives and infrastructure, both within constraint and as Add Packages. Although SPIT has made no formal policy recommendations, the vision, values and goals that have been created and given an informal acceptance by the DPMC clearly indicate a strategic direction for the County. A key decision to be made when allocating General Fund dollars is "*What balance do we seek to achieve between meeting County-wide objectives and meeting program specific needs?*" Although none of the efforts identified under constraint or in the Add Packages appears to be inconsistent with the work SPIT has done thus far, the Add Packages submitted by the departments clearly have more department-specific benefits than the DPMC Add Packages. This does not mean that funding the department Add Packages is not a good idea. They may be critical to those departments meeting their customers' needs. What specifically is funded depends largely on the Chair's overall decisions for 1995-96.

There is no argument that decision making for 1995-96 is hampered by the lack of specific policies and procedures resulting from the work of SPIT. However, we will have these things near the beginning of the 1995-96 fiscal year. For that reason, I encourage a clear message from the Chair's Office that funding decisions are being made with the best information available now, and that adjustments may be made pending the outcomes from SPIT. For example, funding five FTE in DCC may be the best solution under our current support structure. However, if the ultimate recommendation is for a centralized, or contracted, support and maintenance function, the placement of those FTE would be subject to change. I believe if we are to effect radical change in the way IS services are delivered in Multnomah County, not only is the allocation of Add Package dollars subject to change, but the constraint funding as well. This should be clearly communicated to both the departments and the Board.

I hope this serves as a good starting point for our work session on March 28. We can discuss other concerns or questions this information may create at that time. If you would like to review any of the department submissions, any of the data from ISD or need further description of any project, please let me know.

cc:
Meganne Steele
Barry Crook
Betsy Williams
Mike Oswald
SPIT Committee
Kathy Gilette
Department/Division Managers

1995-96 Budget Requests - Data Processing Related Expenditures as Identified by the Divisions/Departments

WITHIN CONSTRAINT - ALL FUNDS

Dept/Div	FTE	Pers. Svcs.	Prof Svcs	Repair/Maint/ Maint Contr	Supplies (MAY INCL EQ)	Training	Other M&S	Equipment	Total w/o SR	ISD SR	Grand Total
Aging	2.00	89,485	7,550	5,210	900	0	0	54,000	157,145	5,376	162,521
CFSD	11.00	551,119	68,028	0	0	8,100	0	78,705	705,952	57,200	763,152
DA	3.00	137,350	0	0	130,000	12,508	0	0	279,858	912,082	1,191,940
DCC	5.00	237,612	150,000	42,500	148,374	20,000	108,940	0	707,426	67,003	774,429
DES (Excl ISD)	6.75	376,577	187,050	212,817	105,285	83,450	62,894	345,310	1,373,383	1,506,391	2,879,774
Health	6.50	357,668	21,850	92,412	341,004	7,200	721,375	122,682	1,664,191	75,381	1,739,572
JJD	4.00	198,188	3,985	0	177,292	6,000	750	39,144	425,359	176,218	601,577
Library	5.50	189,398	154,300	16,200	129,800	8,360	275,759	71,850	845,667	64	845,731
MCSO	4.25	\$195,234	\$73,765	\$69,834	\$53,005	\$6,112	\$0	\$281,043	\$678,993	\$1,594,578	\$2,273,571
MSS/Elected	0.50	22,554	0	4,550	28,550	3,150	340	26,300	85,444	1,709,325	1,794,769
Multi (New Dev)	0.00	0	0	0	0	0	0	0	0	317,800	317,800
Subtotal	48.50	\$2,355,185	\$666,528	\$443,523	\$1,114,210	\$154,880	\$1,170,058	\$1,019,034	\$6,923,418	\$6,421,418	\$13,344,836
ISD	57.50	3,474,000	504,989	479,030	108,552	86,151	2,239,458	373,500	7,265,680	(6,421,418)	844,262
Grand Total	106.00	\$5,829,185	\$1,171,517	\$922,553	\$1,222,762	\$241,031	\$3,409,516	\$1,392,534	\$14,189,098	\$0	\$14,189,098

ADD PACKAGES - ALL FUNDS

Aging					9,300				9,300		9,300
CFSD 1	3.00	119,599	57,000		4,650	750	13,854	6,000	201,853		201,853
CFSD 2	1.00	44,877			700			14,000	59,577		59,577
DA									0		0
DCC	5.00	209,031			1,250		10,619		220,900		220,900
DES (Excl ISD)				500	2,925				3,425		3,425
Health									0		0
JJD									0		0
Library 1	1.50	52,387			161,880		26,724	25,000	265,991		265,991
Library 2							1,905	18,000	19,905		19,905
Library 3			3,000		2,500		8,334	35,000	48,834		48,834
MCSO									\$0		\$0
MSS/Elected 1	1.00	44,930		1,000	5,000	150	274	0	51,354		51,354
MSS/Elected 2								3,000			0
Multi (New Dev)	0.00	0	0	0	0	0	0	0	0	722,200	722,200
Subtotal	11.50	470,824	\$60,000	\$1,500	\$188,205	\$900	\$61,710	\$101,000	\$884,139	\$722,200	\$1,606,339
ISD	0.00	0	0	0	0	0	0	0	0	0	\$0
Grand Total	11.50	470,824	\$60,000	\$1,500	\$188,205	\$900	\$61,710	\$101,000	\$884,139	\$722,200	\$1,606,339



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TO: Beverly Stein, County Chair
Bill Farver, Executive Assistant
Barry Crook, Budget & Quality Manager

FROM: Chris Tebben, Budget Analyst

DATE: March 28, 1995

SUBJECT: Federal and State Reductions

In order to frame the issue of state and federal reductions with a county-wide perspective, I have pulled together a list of all state and federal cuts that we know of at this point in the budget process. Based on current information, the County may lose over \$7 million in state and federal funds in 1995-96. The majority of the cuts are in the Community & Family Services Division, which faces \$6 million in State and federal cuts. Within CFSD, the largest reductions are in Adult Mental Health (\$2 million in outpatient and wraparound services) and Community Action (\$1.8 million, mostly in LIEAP). Aging Services has identified roughly \$1.5 million in Medicaid reductions that are being considered at the State level. DCC will lose \$355,000 from the expiration of the Byrne Grant, and JJD will lose \$117,000 with the expiration of two State grants.

Attached is a table that outlines federal and state reductions and their service impacts. I have indicated whether an add package has been submitted to backfill the reductions. The magnitude or existence of some cuts was not known at the time of the budget meetings with the Chair's Office, so add packages were not submitted; however, the programs would like to include these for consideration if we backfill later in the budget process.

The list of state and federal reductions is likely to grow as the Legislature and Congress progress through the budget cycle. Because of the considerable uncertainty about intergovernmental revenues, I recommend that you reserve a pool of funds until June for backfilling state or federal reductions, rather than making commitments to backfill specific programs before that time.

In many cases, we do not yet know whether funding will be reduced, or by how much. Based on different estimates, Medicaid funding for primary care may remain flat or decline by \$2 million. The Medicaid reductions identified for ASD are speculative. Other ASD funding (Oregon Project Independence) remained intact in the Governor's budget but may yet be reduced by the Legislature. Similarly, federal Older Americans Act funds may be affected if Congress converts them to block grants, but this may not be determined until after the beginning of our fiscal year. The conversion of the school lunch program to a block grant may affect the federal food subsidy for JJD, which is presently budgeted at full funding of \$113 thousand.

In developing this list, I only included revenue cuts that resulted in service reductions. Other revenue reductions appear in the significant changes tables in the budget but do not have service

impacts. Some apparent reductions in the CFSD budget are due to the elimination of carryover estimated in the 1994-95 budget. The \$580,000 reduction in Target Cities is a reduction from the projected 1994-95 budget; revenue estimates were revised downward during the current year as the federal budget was developed, and the budgeted 1995-96 level maintains the revised current year spending levels. Other A&D funding reductions represent a shift of funding sources from State General Fund, which is passed through the County, to Medicaid services that are billed directly, with no effect on service levels or populations.

Program	Source	Reduction	Service Impact	Add Pkg?
Adult Outpatient Mental Health	State MH Grant	\$1,079,785	Eliminates outpatient services for non-Medicaid eligible adults (est. 550 affected)	Yes
Adult Mental Health - SEEDS program	State MH Grant	\$154,030	Eliminates funding for homeless & other clients with serious mental illnesses not served by traditional services.	Yes
Adult Mental Health Wraparound Svcs - Acute Care Respite	State MH Grant	\$238,560	Elimination of respite care that served 528 individuals per year (20 bed capacity in system). Existence presumed in crisis triage model.	Pending
Adult Mental Health Wraparound Svcs - Acute Care Outpatient	State MH Grant	\$435,798	Elimination of intensive short-term outpatient for high users of hospital svcs not eligible for community treatment. 830 served in 94-95; some would continue to be served by Medicaid.	No
Adult Mental Health Wraparound Svcs - Acute Care Transportation	State MH Grant	\$112,423	Elimination of second leg transport for individuals. 693 transports in 1994-95.	No
Children & Youth Program - Children's Outpatient MH	State MH Grant	\$380,504	Eliminates mental health services for non-Medicaid eligible children. Estimated impact: 560 children.	Yes
Children & Youth Program - Partners	State CSD funds	\$450,000	Reduction of CSD contribution to Partners pool.	No
Alcohol & Drug program - Gambling Addiction	Video Poker money	\$581,000	Reduction in funding due to court decision. No service impact because 1994-95 funds were underspent in anticipation of court ruling.	No
Developmental Disabilities - High School Transition	State lottery money	\$160,000	Governor's budget doesn't fund program. Serves 40 young adults per year.	Pending
Community Action - Low Income Energy Asstnce	federal LIEAP grant	\$1.7 million	Reduction of funding for LIEAP program. Potential impact is to eliminate energy subsidies for 7,000 low income individuals.	No

Community Action - Demonstration & Partnership Prog.	federal demonstration grant	\$115,000	Housing stabilization for homeless youth.	No
CFSD/MCCF	State Commission funds	\$190,845	3% ATB reduction, plus set-aside for planning.	Yes
JJD Probation Counseling - SE Office	State Grant	\$103,109	Expiration of State grant used to fund 2.25 positions at SE probation counseling Office. Will increase probation caseloads.	Yes
JJD Probation Counseling	State Grant	\$14,702	Expiration of State grant used to fund .25 of Parole Transition Coordinator who develops parole plans for youths leaving Maclaren.	Yes
ASD - Long Term Care	Medicaid COLA	\$300,000	Potential elimination of COLA for Medicaid funds.	Pending
ASD - Long Term Care	Medicaid PERS	\$300,000	Potential 6% reduction of grant to reflect Measure 8. Would reduce funding for branches.	Pending
ASD	Medicaid staffing standards	\$800K-1M	Potential change in caseload staffing standards; would eliminate 20 Case Mgr & support positions.	Pending
DCC - STOP program	federal Byrne grant	\$355,000	Expiration of grant for drug diversion program, serves 700 offenders per year.	Yes
Total		\$7,314,756		



MULTNOMAH COUNTY, OREGON

BOARD OF COUNTY COMMISSIONERS

BEVERLY STEIN
DAN SALTZMAN
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BUDGET & QUALITY

PORTLAND BUILDING
1120 S.W. FIFTH - ROOM 1400
P. O. BOX 14700
PORTLAND, OR 97214
PHONE (503)248-3883

TO: Barry Crook
FROM: Dave Warren *DCW*
DATE: March 28, 1995
SUBJECT: Training Proposed in the Budget Requests for 1995-96

I have tried to pull together the training included in the budget requests, both the amounts in object code 6310 - Education and Travel, and the amounts in object code 6110 - Professional Services. I may as well start off with the caveats -- the budget requests I used were largely the initial submissions; I have the sense that many of the departments have tampered with them to some extent and that this will make all my bean counting imprecise. I have also not included any of the add package requests, although I will discuss the Employee Services request later in this memo. However, I believe that the picture will not change by the time we release the Executive Budget.

OVERALL SUMMARY

Departments requested \$1,698,394 for training (including travel), about 0.86% of their requested personnel cost. Of this total, \$1,285,809 is in the object code 6310 - Education and Travel, \$418,895 is in object code 6110 - Professional Services.

CATEGORIES OF REQUESTS

As you may have noticed if you looked at the individual departmental training plans, the departments perceive training differently from one another. They focus on different aspects of preparing and sustaining the work force and, consequently, describe it in different terms. This makes summarizing the requests slightly chancy. However, I believe that it is possible to extract common information from the detailed request pages that may be useful. For example, many organizations specifically requested allocations for RESULTS, TQM, and CQI. I have grouped those requests together. I have also summarized the requests for computer training, whether p.c. or mainframe packages. Many departments made a distinction between training for professional or personal development and training specifically related to job requirements, licensing, or certification -- I summarize them separately as "Professional Development" and "Technical" training respectively. A sizable number of requests included allocations for employee safety training, CPR certification, OSHA training, etc. I grouped these requests together, although they do not constitute a large dollar amount. Finally, the requests sometimes separated the cost of conferences and workshops -- I totaled that category as well.

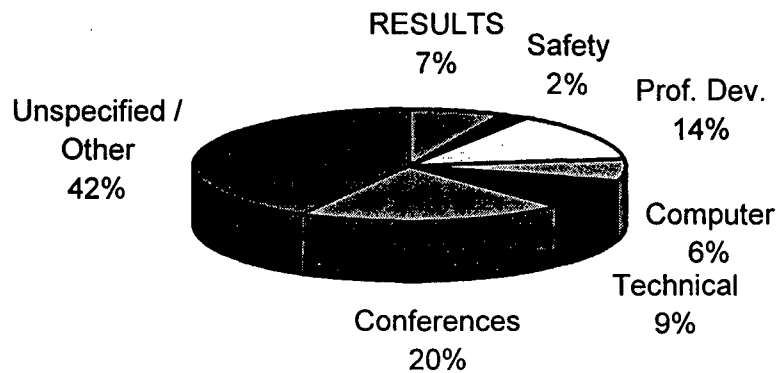
* Note that the training at ISD, however, is not shown as "Computer" training, but is broken between "Conferences", "Technical", "RESULTS," etc.. Total ISD training is \$86,151, by my count, and this would increase "Computer" education to 11% of the total training request.

Training Proposed in the Budget Requests for 1995-96
April 17, 1995

This leaves about 42% of the requests, \$708,216, not categorized by the departments. That is, the request often says something along the line of "skill building, technical and clerical training, professional and bi-lingual programs, and attendance at x, y, and z conferences," without saying how much of the allocation will pay for which part of this list. I have lumped all these amounts together as "Unspecified/Other."

Total_Requests	Total	Professional Services	Education and Travel
RESULTS	\$ 119,719	\$ 81,800	\$ 37,919
Safety	37,110	-	37,110
Prof. Dev.	234,462	171,756	62,706
Computer	108,849	18,481	90,368
Technical	148,247	14,600	133,647
Conferences	341,971	-	341,971
Unspecified / Other	708,216	132,438	575,778
TOTAL	\$ 1,698,574	\$ 419,075	\$ 1,279,499

Total



REQUESTS AND THE BENCHMARK

Last year, we began to track the amounts spent on education in relation to total personnel expenditures as a way to measure our activity against the Oregon Benchmarks. At that time the benchmark was that organizations should spend two percent of the cost of personnel on training for those personnel. The latest version of the Benchmarks has dropped this measurement and substituted "Percentage of total employee time actually used for on the job training." While I can see a point to this substitution, we have no system in place to track the effort in these terms. I recommend continuing to report on the old measurement until we can produce adequate information about how much time employees spend being educated.

Training Proposed in the Budget Requests for 1995-96
April 17, 1995

From the budget request, it is fairly easy to show how much money employee training will cost and how that spending will relate to personnel costs. The following table shows these figures.

Training Cost Compared to Personnel Cost	Total Personnel	Training	Percent of Personnel
Community and Family	\$ 14,832,696	\$ 152,190	1.03%
Aging Services	8,043,336	39,971	0.50%
Juvenile Justice	10,278,106	32,747	0.32%
Health	43,267,154	446,909	1.03%
Community Corrections	15,907,202	90,800	0.57%
District Attorney	10,166,793	65,390	0.64%
Sheriff	45,549,210	195,683	0.43%
Environmental Services	30,885,114	353,883	1.15%
Library	13,165,258	50,805	0.39%
Nondepartmental	6,227,805	90,600	1.45%
Countywide Training	-	179,416	N/A
TOTAL	\$198,322,674	\$ 1,698,394	0.86%

Note that the amounts allocated differ significantly among departments. Juvenile Justice and the Library both allocate less than 0.4 percent of personnel for training expenditures. Only Community and Family, Health, and Nondepartmental allocate more than one percent of personnel for training.

ADD PACKAGE FROM EMPLOYEE SERVICES

Employee Services has requested an add package to enhance the level of training provided by the County. This package consists of some personnel additions to administer the increased level of training. For the purposes of this memo, I am only considering the amount included for actual training provided.

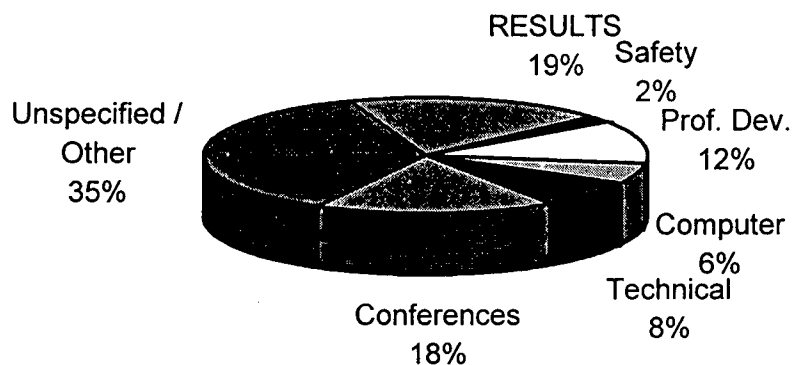
The package will increase training by \$249,039, allocating all of it for RESULTS. This will have a significant impact on the total level of training when compared to total personnel costs, increasing it to 0.98 percent, slightly less than half the 1993 Oregon Benchmark.

Training Proposed in the Budget Requests for 1995-96
April 17, 1995

Training (With Add) Compared to Personnel Cost	Total Personnel	Training	Percent of Personnel
Community and Family	\$ 14,832,696	\$ 152,190	1.03%
Aging Services	8,043,336	39,971	0.50%
Juvenile Justice	10,278,106	32,747	0.32%
Health	43,267,154	446,909	1.03%
Community Corrections	15,907,202	90,800	0.57%
District Attorney	10,166,793	65,390	0.64%
Sheriff	45,549,210	195,683	0.43%
Environmental Services	30,885,114	353,883	1.15%
Library	13,165,258	50,805	0.39%
Nondepartmental	6,227,805	90,600	1.45%
Countywide Training	-	428,465	N/A
TOTAL	\$198,322,674	\$ 1,947,443	0.98%

The add package will change the proportionate allocation of training expenditures as well. It will raise the amount clearly designated for RESULTS to near twenty percent of the entire amount spent.

Training including Add Package



Summary

Fund	Agency	Org	Total	Dept Sum	Proposed PS
156	10	CFS	\$ 152,190	\$ 152,190	\$ 14,832,696
100	10	JJD	18,429		1.03%
156	10	JJD	14,318	32,747	10,278,106
100	10	Aging	2,200		0.32%
156	10	Aging	37,771	39,971	8,043,336
100	15	Health	8,000		0.50%
156	15	Health	438,909	446,909	43,267,154
156	21	DCC	86,800		1.03%
180	21	DCC	4,000	90,800	15,907,202
100	23	DA	39,940		0.57%
156	23	DA	25,210		
180	23	DA	240	65,390	10,166,793
100	25	SO	115,931		0.64%
156	25	SO	39,281		
169	25	SO	7,000		
180	25	SO	33,471	195,683	45,549,210
100	30	DES	46,637		0.43%
150	30	DES	78,900		
154	30	DES	300		
158	30	DES	2,200		
161	30	DES	13,800		
167	30	DES	4,500		
175	30	DES	55,579		
240	30	DES	1,200		
401	30	DES	14,500		
402	30	DES	16,370		
403	30	DES	86,151		
404	30	DES	2,500		
410	30	DES	31,246	353,883	30,885,114
100	50	NON	70,669		1.15%
156	50	NON	6,850		
400	50	NON	13,081	90,600	6,227,805
162	80	Lib	49,705		1.45%
362	80	Lib	1,100	50,805	13,165,258
100	50	Ctywide	63,000		0.39%
400	50	Ctywide	116,416	179,416	0
			\$ 1,698,394	\$ 1,698,394	\$ 198,322,674
					0.86%

**Total Noted Allocations for Travel and Education
Proposed for 1995-96**

Fund	Agency	Org	TOTAL	Departmental Subtotals	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other	
100	010	1980	2,200		-	-	-	-	-	550	1,650	
100	010	2605	13,829		-	-	-	-	-	-	13,829	
100	010	2610	4,000		-	-	-	4,000	-	-	-	
100	010	2620	600		-	600	-	-	-	-	-	
100	010	2640	-		-	-	-	-	-	-	-	
156	010	0110	24,600		15,000	-	5,000	-	1,200	1,400	2,000	
156	010	0120	4,204		-	-	-	-	-	-	4,204	
156	010	0130	400		400	-	-	-	-	-	-	
156	010	0140	1,670		-	-	-	-	-	-	1,670	
156	010	0150	1,349		-	-	-	-	-	-	1,349	
156	010	1001	1,250		-	-	-	-	-	-	1,250	
156	010	1010	5,750		-	-	-	-	-	-	5,750	
156	010	1101	3,200		-	-	-	-	-	2,000	1,200	
156	010	1110	5,695		-	-	-	-	2,400	3,495	(200)	
156	010	1130	23,092		-	-	-	3,850	-	19,242	-	
156	010	1190	2,022		-	-	-	-	-	-	2,022	
156	010	1251	8,831		1,000	-	-	-	-	3,500	4,331	
156	010	1260	6,317		529	-	788	-	-	5,000	-	
156	010	1270	740		-	-	-	-	-	-	740	
156	010	1280	5,820		-	-	-	-	-	5,820	-	
156	010	1301	28,260		-	-	-	-	-	8,100	20,160	
156	010	1451	2,250		-	-	-	-	-	1,500	750	
156	010	1460	2,160		-	-	-	-	-	1,500	660	
156	010	1470	1,590		-	-	-	-	-	1,200	390	
156	010	1501	1,485		-	-	-	-	-	-	1,485	
156	010	1510	13,310		-	-	-	-	-	-	13,310	
156	010	1520	2,160		-	-	-	-	-	-	2,160	
156	010	1530	1,688		-	-	-	-	-	-	1,688	
156	010	1540	2,376		-	-	-	-	-	-	2,376	
156	010	1550	405		-	-	-	-	-	-	405	
156	010	1560	540		-	-	-	-	-	-	540	
156	010	1570	1,026		-	-	-	-	-	-	1,026	
156	010	1710	7,046	Community and Family Services	-	-	-	-	-	3,846	3,200	
156	010	1751	5,075	164,311	-	-	-	-	-	3,425	1,650	
156	010	1910	7,850		-	-	-	-	-	1,962	5,888	
156	010	1915	4,300		-	-	-	-	-	1,075	3,225	
156	010	1920	3,500		-	-	-	-	-	875	2,625	
156	010	1930	5,450	Aging Services	-	-	-	-	-	1,362	4,088	
156	010	1940	4,550	27,850	-	-	-	-	-	1,138	3,412	
156	010	2605	12,318		-	-	-	-	-	-	12,318	
156	010	2610	2,000		-	-	-	2,000	-	-	-	
156	010	2620	-	Juvenile Justice	-	-	-	-	-	-	-	
156	010	2640	-	32,747	-	-	-	-	-	-	-	
100	015	0200	8,000	Health	1,000	-	7,000	-	-	-	-	
156	015	0200	438,909	446,909	23,000	-	25,000	2,000	14,600	59,830	314,479	

**Total Noted Allocations for Travel and Education
Proposed for 1995-96**

Fund	Agency	Org	TOTAL	Departmental Subtotals	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other	
156	021	2170	80,000		20,000	30,000	-	20,000	-	10,000	-	
156	021	2310	4,800		4,800	-	-	-	-	-	-	
156	021	2806	2,000	Community Corrections	-	-	2,000	-	-	-	-	
180	021	2130	4,000	90,800	-	-	-	-	1,000	3,000	-	
100	023	2411	17,202		245	-	-	12,508	-	4,449	-	
100	023	2431	2,380		-	-	-	-	-	2,380	-	
100	023	2434	2,085		-	-	-	-	660	1,425	-	
100	023	2435	1,272		-	-	-	-	-	1,272	-	
100	023	2441	15,824		-	-	-	-	-	13,824	2,000	
100	023	2452	135		-	-	-	-	-	135	-	
100	023	2461	1,042		-	-	-	417	-	625	-	
156	023	2432	9,575		3,200	-	-	500	-	4,875	1,000	
156	023	2437	13,200		-	-	-	-	-	13,200	-	
156	023	2449	2,435	District Attorney	-	-	-	-	-	2,435	-	
180	023	2442	240	65,390	-	-	-	-	-	240	-	
100	025	3005	15,829		-	-	9,000	-	-	-	6,829	
100	025	3008	5,000		-	-	-	-	5,000	-	-	
100	025	3021	4,535		-	-	-	-	-	-	4,535	
100	025	3023	6,000		-	-	-	6,000	-	-	-	
100	025	3024	5,938		-	-	1,900	-	-	-	4,038	
100	025	3025	14,522		-	-	-	14,522	-	-	-	
100	025	3026	2,500		-	-	-	2,500	-	-	-	
100	025	3102	44,564		-	-	-	-	44,564	-	-	
100	025	3810	9,043		-	-	-	-	-	-	9,043	
100	025	3911	5,500		-	-	-	500	-	-	5,000	
100	025	4110	2,500		-	-	-	2,500	-	-	-	
156	025	4118	39,281		-	-	39,281	-	-	-	-	
169	025	3955	7,000		-	-	-	-	7,000	-	-	
180	025	3116	4,000		-	-	-	4,000	-	-	-	
180	025	3120	8,000		-	-	-	8,000	-	-	-	
180	025	3130	15,971		-	-	-	1,471	14,500	-	-	
180	025	3318	2,500	Sheriff	-	-	-	-	-	-	2,500	
180	025	3319	3,000	195,683	-	-	-	-	-	-	3,000	
100	030	5010	8,300		-	-	-	-	-	-	8,300	
100	030	5200	4,000		-	-	-	-	-	-	4,000	
100	030	5810	1,800		-	-	-	-	-	-	1,800	
100	030	5820	5,200		-	-	-	-	-	-	5,200	
100	030	5830	3,000		-	-	-	-	-	-	3,000	
100	030	5840	5,400		-	-	-	-	-	-	5,400	
100	030	5930	7,500		-	-	-	-	7,500	-	-	
100	030	5940	2,088		-	-	-	-	-	2,088	-	
100	030	7575	2,000		-	-	-	-	-	2,000	-	
100	030	7690	7,349		-	-	3,340	-	-	4,009	-	
150	030	6101	21,750		-	-	-	-	-	-	21,750	
150	030	6102	6,500		-	-	-	-	-	-	6,500	

**Total Noted Allocations for Travel and Education
Proposed for 1995-96**

Fund	Agency	Org	TOTAL	Departmental Subtotals	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other	
150	030	6104	26,900		-	-	-	-	-	-	26,900	
150	030	6105	6,000		-	-	-	-	-	-	6,000	
150	030	6300	1,500		-	-	-	-	-	-	1,500	
150	030	6400	10,050		-	-	-	-	2,800	7,250	-	
150	030	6500	6,200		-	-	-	-	-	-	6,200	
154	030	6220	300		-	-	-	-	300	-	-	
158	030	5655	500		-	-	-	-	-	-	500	
158	030	7631	1,700		-	-	-	-	-	1,200	500	
161	030	6610	5,500		-	4,700	-	-	-	800	-	
161	030	6700	8,300		-	-	-	-	-	4,800	3,500	
167	030	6320	4,500		-	-	-	-	-	-	4,500	
175	030	7390	100		-	-	100	-	-	-	-	
175	030	7565	13,769		-	210	11,410	-	799	1,350	-	
175	030	7566	17,450		-	-	-	3,600	-	-	13,850	
175	030	7570	1,550		-	-	500	-	150	900	-	
175	030	7585	2,150		-	-	400	-	650	1,100	-	
175	030	7590	8,580		-	-	2,250	-	5,880	450	-	
175	030	7600	1,950		-	-	450	-	1,500	-	-	
175	030	7610	6,280		-	-	1,600	-	4,230	450	-	
175	030	7630	3,750		-	-	700	-	250	2,800	-	
240	030	5705	1,200		-	-	-	-	-	-	1,200	
401	030	5901	2,500		-	-	-	-	-	-	2,500	
401	030	5905	12,000		-	-	-	-	-	-	12,000	
402	030	7990	16,370		-	-	-	-	11,970	4,400	-	
403	030	7930	13,530		5,000	-	1,450	-	-	7,080	-	
403	030	7935	919		-	-	-	-	-	-	919	
403	030	7940	26,083		3,345	-	1,832	7,456	-	13,450	-	
403	030	7945	8,359		-	-	-	-	-	8,359	-	
403	030	7950	4,260		-	-	-	-	-	4,260	-	
403	030	7960	20,825		-	-	-	-	-	20,825	-	
403	030	7970	12,175		-	-	-	-	-	-	12,175	
404	030	5950	2,500		-	-	-	-	-	-	2,500	
410	030	5610	7,305		-	-	-	-	-	-	7,305	
410	030	5630	21,941	Environmental Services	-	-	-	-	-	-	21,941	
410	030	5640	2,000	353,883	-	-	-	-	-	-	2,000	
100	050	7020	450		-	-	-	-	-	-	450	
100	050	7050	2,169		-	-	-	-	2,169	-	-	
100	050	7220	3,100		-	-	-	-	-	3,100	-	
100	050	7400	4,800		-	-	-	-	-	3,900	900	
100	050	7405	10,400		-	-	-	1,000	-	4,000	5,400	
100	050	7410	5,000		-	-	-	-	-	-	5,000	
100	050	7412	5,400		-	-	-	-	-	4,200	1,200	
100	050	7415	3,250		-	-	-	-	-	3,250	-	
100	050	7420	5,100		-	-	-	-	-	3,900	1,200	
100	050	7440	11,200		-	-	-	2,250	-	8,950	-	

**Total Noted Allocations for Travel and Education
Proposed for 1995-96**

Fund	Agency	Org	TOTAL	Departmental Subtotals	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other	
100	050	7510	2,000		-	-	-	-	-	-	2,000	
100	050	7512	63,300		38,000	-	-	-	-	-	25,300	
100	050	7650	1,500		-	-	-	-	1,500	-	-	
100	050	9025	9,850		-	-	-	-	9,850	-	-	
100	050	9203	3,000		-	-	-	-	-	-	3,000	
100	050	9210	1,650		-	-	-	-	-	-	1,650	
100	050	9250	250		-	-	-	-	-	-	250	
100	050	9275	1,250		-	-	-	1,250	-	-	-	
156	050	6900	4,350		-	-	-	-	-	-	4,350	
156	050	9030	-		-	-	-	-	-	-	-	
156	050	9035	2,500		-	-	-	-	-	-	2,500	
400	050	7234	5,450		2,100	-	2,250	-	1,100	-	-	
400	050	7234	116,416		-	-	116,416	-	-	-	-	
400	050	7515	5,300	Nondepartmental	-	-	-	900	1,800	1,600	1,000	
400	050	7561	2,331	270,016	-	-	-	-	2,330	-	1	
162	080	8110	3,900		-	-	900	-	-	3,000	-	
162	080	8120	50		-	25	-	-	-	25	-	
162	080	8130	1,950		-	-	600	750	-	600	-	
162	080	8140	200		-	200	-	-	-	-	-	
162	080	8170	1,875		-	-	-	-	-	1,875	-	
162	080	8201	2,070		100	25	-	-	-	1,945	-	
162	080	8203	1,460		-	25	-	-	350	1,085	-	
162	080	8204	980		-	25	-	-	175	780	-	
162	080	8205	720		-	100	-	-	-	620	-	
162	080	8207	3,435		2,000	25	-	-	250	1,160	-	
162	080	8208	230		-	50	-	-	-	180	-	
162	080	8209	485		-	-	-	-	100	385	-	
162	080	8210	2,060		-	25	-	-	100	1,935	-	
162	080	8211	2,345		-	25	115	-	250	1,925	30	
162	080	8212	425		-	125	-	-	-	300	-	
162	080	8213	1,275		-	25	-	-	200	1,050	-	
162	080	8217	820		-	25	-	-	270	525	-	
162	080	8218	525		-	25	-	350	-	150	-	
162	080	8310	400		-	-	-	-	-	400	-	
162	080	8330	1,550		-	-	-	800	-	750	-	
162	080	8340	2,600		-	-	-	1,850	-	750	-	
162	080	8350	250		-	-	-	-	-	250	-	
162	080	8410	700		-	-	-	-	-	700	-	
162	080	8430	2,000		-	-	-	-	500	1,500	-	
162	080	8445	25		-	25	-	-	-	-	-	
162	080	8450	500		-	50	-	-	-	450	-	
162	080	8455	1,550		-	25	-	-	150	1,350	25	
162	080	8460	3,825		-	-	-	3,375	-	450	-	
162	080	8501	1,375		-	-	-	-	-	1,375	-	
162	080	8520	275		-	25	-	-	-	250	-	

**Total Noted Allocations for Travel and Education
Proposed for 1995-96**

Fund	Agency	Org	TOTAL	Departmental Subtotals	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other	
162	080	8525	580		-	50	-	-	-	530	-	
162	080	8530	580		-	50	-	-	-	530	-	
162	080	8535	580		-	50	-	-	-	530	-	
162	080	8540	765		-	50	-	-	-	715	-	
162	080	8545	580		-	50	-	-	-	530	-	
162	080	8550	580		-	50	-	-	-	530	-	
162	080	8555	765		-	50	-	-	-	715	-	
162	080	8560	765		-	50	-	-	-	715	-	
162	080	8565	580		-	50	-	-	-	530	-	
162	080	8570	580		-	50	-	-	-	530	-	
162	080	8575	580		-	50	-	-	-	530	-	
162	080	8580	275		-	25	-	-	-	250	-	
162	080	8585	580		-	50	-	-	-	530	-	
162	080	8620	1,400		-	-	-	-	200	1,200	-	
162	080	8650	95		-	25	-	-	-	75	(5)	
162	080	8680	220		-	-	-	-	-	220	-	
162	080	8690	345	Library	-	25	-	-	-	320	-	
362	080	8115	1,100	50,805	-	-	-	500	-	650	(50)	
.			1,698,394	TOTALS	119,719	37,035	234,282	108,849	148,247	340,546	709,716	-

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
100	010	1980	2,200	conference (550)						550	1,650
100	010	2605	13,829	skill-bldg, tech & clerical, professional and bi lingual, and conferences							13,829
100	010	2610	4,000	computer (4,000)				4,000			-
100	010	2620	600	CPR certification (600		600					-
100	010	2640	-								-
156	010	0110	4,600	technical (1,200), conference (1,400)					1,200	1,400	2,000
156	010	0120	4,204								4,204
156	010	0130	400	RESULTS (400)	400						-
156	010	0140	1,670								1,670
156	010	0150	1,349								1,349
156	010	1001	1,250								1,250
156	010	1010	5,750								5,750
156	010	1101	3,200	conference (2,000)						2,000	1,200
156	010	1110	5,695	technical (2,400), conference (3,495)					2,400	3,495	(200)
156	010	1130	23,092	computer (3,850), conference (19,242)				3,850		19,242	-
156	010	1190	2,022								2,022
156	010	1251	8,831	RESULTS (1,000), conference (3,500)	1,000					3,500	4,331
156	010	1260	6,317	mgmt (788), RESULTS (529), conferences (5,000)	529		788			5,000	-
156	010	1270	740								740
156	010	1280	5,820	conference (5,820)						5,820	-
156	010	1301	28,260	conference (8,100)						8,100	20,160
156	010	1451	2,250	conference (1,500)						1,500	750
156	010	1460	2,160	conference (1,500)						1,500	660
156	010	1470	1,590	conference (1,200)						1,200	390
156	010	1501	1,485								1,485
156	010	1510	13,310								13,310
156	010	1520	2,160								2,160
156	010	1530	1,688								1,688
156	010	1540	2,376								2,376
156	010	1550	405								405
156	010	1560	540								540
156	010	1570	1,026								1,026
156	010	1710	7,046	conference (3,846)						3,846	3,200
156	010	1751	5,075	conference (3,425)						3,425	1,650
156	010	1910	7,850	conference (1,962)						1,962	5,888
156	010	1915	4,300	conference (1,075)						1,075	3,225
156	010	1920	3,500	conference (875)						875	2,625
156	010	1930	5,450	conference (1,362)						1,362	4,088
156	010	1940	4,550	conference (1,138)						1,138	3,412
156	010	2605	12,318	skill-bldg, tech & clerical, professional and bi lingual, and conferences							12,318

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
156	010	2610	2,000	computer (2,000)				2,000			-
156	010	2620	-								-
156	010	2640	-								-
100	015	0200	0								-
156	015	0200	270,909	conferences (59,830)						59,830	211,079
156	021	2170	80,000	computer (20,000), safety (30,000), RESULTS (20,000), conference (10,000)	20,000	30,000		20,000		10,000	-
156	021	2310	-								-
156	021	2806	-								-
180	021	2130	4,000	technical (1,000), conferece (3,000)					1,000	3,000	-
100	023	2411	17,202	computer (12,508), conference (4,449), RESULTS (245)	245			12,508		4,449	-
100	023	2431	2,380	conference (2,380)						2,380	-
100	023	2434	2,085	technical (660), conference (1,425)					660	1,425	-
100	023	2435	1,272	conference (1,272)						1,272	-
100	023	2441	15,824	conference (13,824)						13,824	2,000
100	023	2452	135	conferece (135)						135	-
100	023	2461	1,042	conference (625), computer (417)				417		625	-
156	023	2432	9,575	conference (4,875), computer (500), RESULTS (3,200)	3,200			500		4,875	1,000
156	023	2437	13,200	conference (13,200)						13,200	-
156	023	2449	2,435	conference (2,435)						2,435	-
180	023	2442	240	conference (240)						240	-
100	025	3005	6,829	conferences, training facility rent, and various training							6,829
100	025	3008	5,000	methods of investigation					5,000		-
100	025	3021	4,535	professional development, ADA, affirmative action, and conferences							4,535
100	025	3023	6,000	computer training and train the trainer				6,000			-
100	025	3024	1,900	stay current with industry standards			1,900				-
100	025	3025	3,112	agency training associated with P.C.'s				3,112			-
100	025	3026	2,500	Mgrial accounting, purchasing, database, spreadsheet development				2,500			-
100	025	3102	44,564	search and rescue, officer safety, ICS, weapons, driving, canine					44,564		-
100	025	3810	9,043	officer safety procedures, counseling techniques, communications skills, cultural diversity							9,043
100	025	3911	5,500					500			5,000
100	025	4110	2,500	LAN computer training and enhancement				2,500			-
156	025	4118	39,281	training so that CO's can participate with treatment staff			39,281				-

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
169	025	3955	7,000	procedures to maintain accreditation and readiness					7,000		-
180	025	3116	4,000	DARE certification				4,000			-
180	025	3120	8,000	narcotics enforcement training				8,000			-
180	025	3130	14,500	solid waste and environmental enforcement					14,500		-
180	025	3318	2,500	computer training, fingerprint/photography equipment, and conferences							2,500
180	025	3319	3,000	staff planning retreat, conferences, seminars pertaining to security and alarm systems							3,000
100	030	5010	8,300	Department wide cross-cultural issues, TQM, prog eval, DES Admin staff in using software							8,300
100	030	5200	4,000	Division diversity training, TQM, prog. eval. Teambuilding, computer, technical and Planning Commission training							4,000
100	030	5810	1,800	Temporary license canvassers (800) and Oreg. An. Control Council Conf. (1,000)							1,800
100	030	5820	5,200	Department cross-cultural issues, TQM, Prog eval, and technical							5,200
100	030	5830	3,000	Department cross-cultural issues, TQM, Prog eval, and technical							3,000
100	030	5840	5,400	Department cross-cultural issues, TQM, Prog eval, and technical							5,400
100	030	5930	7,500	Motorola radio tech trg (2000), tuition (500), apprenticeship related classes (4,000), seminars and tech trg. (1,000).					7,500		-
100	030	5940	2,088	Local ARMA mtgs (288), seminars (400), ARMA Regional Conf. (800), NW Archivist Conf (600)						2,088	-
100	030	7575	2,000	Clerks convention/conf (2,000),						2,000	-
100	030	7690	7,349	conferences (4,009), personal/prof dev (3340)			3,340			4,009	-
150	030	6101	21,750	Tech and continuing ed, AOC, APWA and other conferences.							21,750
150	030	6102	6,500	Tech and continuing ed., AOC, OACES, Mainstem, NAFA and other conferences, safety and emgcy mgt trg.							6,500
150	030	6104	26,900	Project mgmet, computer trg, RESULTS trg, planning seminars (11,900), conferences (AOC, OACES, urban Planning Conf, and contract for computer trg. for Transp. Divis. (15,000)							26,900

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
150	030	6105	6,000	New tech, continuing ed, legal issues, right of way law, safety, and conferences							6,000
150	030	6300	1,500	OACES Conf, AOC, Pulic Land Surveyors Conf, safety and computer trg.							1,500
150	030	6400	10,050	tech trg., equip devel., haz mat, personnel skills, (2,100), Conferencens (APWA - 3,000, OACES - 500, APWA trg confe - 1,500, ODOT semin - 750, other seminars - 1,500, herbicide recert. - 700)					2,800	7,250	-
150	030	6500	6,200	traffic signal design, accident invest. traffic modeling, specialized conferences							6,200
154	030	6220	300	bike planning training					300		-
158	030	5655	500	Purchase reference manuals							500
158	030	7631	1,700	reference materials (500), conference (900), meetings (300)						1,200	500
161	030	6610	5,500	new tech, OR-OSHA safety (4,700), Western Movable Bridge Conf. (800)		4,700				800	-
161	030	6700	8,300	elect. structural, mechanical engineering and computer tech - conferences (Bridge Conf (1,200), OACE (600), Bridge Coating Seminar (1,400), Seismic Retrofit of bridges (500), Lead Base Paint Removal (1,100)						4,800	3,500
167	030	6320	4,500	BLM advanced CAD Astral Conf,							4,500
175	030	7390	100	DOR law school			100				-
175	030	7565	6,609	Assessors conferences (900). Tax Collector Conf (450), tech training (699), prof dev / supv dev. (4,250), first aid (210), legislative update (100)		210	4,250		799	1,350	-
175	030	7566	13,850	Appraisal trg, system trg. DPMgrs conf and Assessors Conf.							13,850
175	030	7570	1,550	Assessors Conf (900), tuition (500), DOR Law (150)			500		150	900	-
175	030	7585	2,150	Assessors Conf (900), DOR mgmt prog (200), appraisal courses (650), tuition (400)			400		650	1,100	-
175	030	7590	8,580	Assessors conf (450), appraisal courses (5,880), DOR mgmt prog (1,250), tuition (1,000)			2,250		5,880	450	-
175	030	7600	1,950	appraisal courses (1,500), DOR mgmt prog (250), tuition (200)			450		1,500		-
175	030	7610	6,280	Assessors conf (450), appraisal courses (4,230), DOR mgmt prog (1,000), tuition (600)			1,600		4,230	450	-

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
175	030	7630	3,750	Assessors/tax coll. conf (2,700), Leg update (250), DOR trg (400), tuition (300), group meetings (100)			700		250	2,800	-
240	030	5705	1,200	Staff training for 6 FTE							1,200
401	030	5901	2,500	National Asoc of Fleet Admin or Am. Pub Wks Assoc, and local seminars							2,500
401	030	5905	12,000	DEQ emission testing cert., safety, haz mat, softwre, tuition reimbursement. Conferences (UW Vehicle Mte mgmet Conf., Am Pub Wks Nat Conf, Nat. Assoc. of Fleet Admin)							12,000
402	030	7990	16,370	tech training (11,970), conferences (4,400)					11,970	4,400	-
403	030	7930	13,530	RESULTS (5,000), tuition (1,450), conferences (7,080)	5,000		1,450			7,080	-
403	030	7935	919								919
403	030	7940	26,083	TQM (3,345), Client/Svr (7,456), tuition (1,832), conferences (13,450)	3,345		1,832	7,456		13,450	-
403	030	7945	8,359	conferences						8,359	-
403	030	7950	4,260	conferences						4,260	-
403	030	7960	20,825	tech conferences						20,825	-
403	030	7970	12,175	workshops and software training							12,175
404	030	5950	2,500	First aid cert, safety trg, seminars, and US Postal Svc National Postal Forum							2,500
410	030	5610	7,305	Technical training and IFMA confereance							7,305
410	030	5630	21,941	Recertifications and skill upgrades							21,941
410	030	5640	2,000	Customer service training to 6.5 FTE							2,000
100	050	7020	450								450
100	050	7050	2,169	technical (2,169)					2,169		-
100	050	7220	3,100	conference (3,100)						3,100	-
100	050	7400	4,800	conference (3,900)						3,900	900
100	050	7405	10,400	conference (8,200)				1,000		4,000	5,400
100	050	7410	5,000	conference (4,000), computer (1000)							5,000
100	050	7412	5,400	conference (4,200)						4,200	1,200
100	050	7415	3,250	conference (3,250)						3,250	-
100	050	7420	5,100	conference (3,900)						3,900	1,200
100	050	7440	11,200	computer (2,250), conference (8,950)				2,250		8,950	-
100	050	7510	2,000								2,000
100	050	7512	300								300
100	050	7650	1,500	technical (1,500)					1,500		-
100	050	9025	9,850	technical (9,850)					9,850		-
100	050	9203	3,000								3,000
100	050	9210	1,650								1,650
100	050	9250	250								250

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
100	050	9275	1,250	computer (1,250)				1,250			-
156	050	6900	4,350								4,350
156	050	9030									-
156	050	9035	2,500								2,500
400	050	7234	5,450	RESULTS (2,100), mgmt (2,250), technical (1,100)	2,100		2,250		1,100		-
400	050	7234	-								-
400	050	7515	5,300	computer (900), conference (1,600), technical (1,800)				900	1,800	1,600	1,000
400	050	7561	2,331	technical (2,330)					2,330		1
162	080	8110	3,900	conferences/symposia (3,000), clerical (300), mgmt (600)			900			3,000	-
162	080	8120	50	first aid (25), workshop (25)		25				25	-
162	080	8130	1,950	mgmt (600), computer (750), conference (600)			600	750		600	-
162	080	8140	200	safety (200)		200					-
162	080	8170	1,875	conference (1,875)						1,875	-
162	080	8201	2,070	RESULTS (100), conferences (1,820), workshop (125), safety (25)	100	25				1,945	-
162	080	8203	1,460	technical training (350) safety (25), conference (1,085)		25			350	1,085	-
162	080	8204	980	technical (175), safety (25), conference (780)		25			175	780	-
162	080	8205	720	first aid (100), conferences (620)		100				620	-
162	080	8207	3,435	technical training (250, safety (25), conference (1,160), RESULTS (2,000)	2,000	25			250	1,160	-
162	080	8208	230	safety (50), conference (180)		50				180	-
162	080	8209	485	technical (100), safety (25), conference (385)		-			100	385	-
162	080	8210	2,060	technical (100), safety (25), conference (1,935)		25			100	1,935	-
162	080	8211	2,345	technical (250), mgmt (115), safety (25), conference (1,925)		25	115		250	1,925	30
162	080	8212	425	safety (125), conferences (300)		125				300	-
162	080	8213	1,275	technical (200), safety (25), conference (1050)		25			200	1,050	-
162	080	8217	820	technical (270), safety (25), conference (525)		25			270	525	-
162	080	8218	525	computer (350), safety (25), conference (150)		25		350		150	-
162	080	8310	400	conference (400)						400	-
162	080	8330	1,550	computer (800), conference (750)				800		750	-
162	080	8340	2,600	computer (1,850), conference (1,450)				1,850		750	-

TRAVEL AND TRAINING
Proposed for 1995-96

Fund	Agency	Org	6310	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
162	080	8350	250	conference (250)						250	-
162	080	8410	700	conference (700)						700	-
162	080	8430	2,000	conference (1,500), technical (500)					500	1,500	-
162	080	8445	25	safety (25)		25					-
162	080	8450	500	safety (50, conference (450)		50				450	-
162	080	8455	1,550	safety (25), technical (150), conference (1,350)		25			150	1,350	25
162	080	8460	3,825	computer (3,375), conference (450)				3,375		450	-
162	080	8501	1,375	conference (1375)						1,375	-
162	080	8520	275	conference (250), safety (50)		25				250	-
162	080	8525	580	conference (530), safety (50)		50				530	-
162	080	8530	580	conference (530), safety (50)		50				530	-
162	080	8535	580	conference (530), safety (50)		50				530	-
162	080	8540	765	conference (715), safety (50)		50				715	-
162	080	8545	580	conference (530), safety (50)		50				530	-
162	080	8550	580	conference (530), safety (50)		50				530	-
162	080	8555	765	conference (715), safety (50)		50				715	-
162	080	8560	765	conference (715), safety (50)		50				715	-
162	080	8565	580	conference (530), safety (50)		50				530	-
162	080	8570	580	conference (530), safety (50)		50				530	-
162	080	8575	580	conference (530), safety (50)		50				530	-
162	080	8580	275	conference (250), safety (50)		25				250	-
162	080	8585	580	conference (530), safety (50)		50				530	-
162	080	8620	1,400	technical (200), conference (1,200)					200	1,200	-
162	080	8650	95	safety (25), conference (75)		25				75	(5)
162	080	8680	220	conference (220)						220	-
162	080	8690	345	conference (320), safety (25)		25				320	-
362	080	8115	1,100	computer (500), conference (650)				500		650	(50)
		TOTAL	1,285,809		37,919	37,035	62,706	90,368	133,647	340,546	577,278
											-
											-

TRAINING IN PROFESSIONAL SERVICES
Proposed for 1995-96

Fund	Agency	Org	6110	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
100	010	1980									-
100	010	2605									-
100	010	2610									-
100	010	2620									-
100	010	2640									-
156	010	0110	20,000	cultural diversity (5,000), RESULTS (15,000)	15,000		5,000				-
156	010	0120									-
156	010	0130									-
156	010	0140									-
156	010	0150									-
156	010	1001									-
156	010	1010									-
156	010	1101									-
156	010	1110									-
156	010	1130									-
156	010	1190									-
156	010	1251									-
156	010	1260									-
156	010	1270									-
156	010	1280									-
156	010	1301									-
156	010	1451									-
156	010	1460									-
156	010	1470									-
156	010	1501									-
156	010	1510									-
156	010	1520									-
156	010	1530									-
156	010	1540									-
156	010	1550									-
156	010	1560									-
156	010	1570									-
156	010	1710									-
156	010	1751									-
156	010	1910									-
156	010	1915									-
156	010	1920									-
156	010	1930									-
156	010	1940									-
156	010	2605									-
156	010	2610									-
156	010	2620									-

TRAINING IN PROFESSIONAL SERVICES
Proposed for 1995-96

Fund	Agency	Org	6110	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
156	010	2640									-
100	015	0200	8,000	CQI consultation, training, facilitation, staff development	1,000		7,000				-
156	015	0200	168,000	HIV ed. (14600), CQI (23,000), computer (2,000), cultural diversity (25,000)	23,000		25,000	2,000	14,600		103,400
156	021	2170									-
156	021	2310	4,800	TQM initiatives and facilitation	4,800						-
156	021	2806	2,000	Invest Learning -- staff development			2,000				-
180	021	2130									-
100	023	2411									-
100	023	2431									-
100	023	2434									-
100	023	2435									-
100	023	2441									-
100	023	2452									-
100	023	2461									-
156	023	2432									-
156	023	2437									-
156	023	2449									-
180	023	2442									-
100	025	3005	9,000	Peer support training services			9,000				-
100	025	3008									-
100	025	3021									-
100	025	3023									-
100	025	3024	4,038	Professional expertise and instructors (in Sheriff's Training section)							4,038
100	025	3025	11,410	(in 6230 - for a computer training center)				11,410			-
100	025	3026									-
100	025	3102									-
100	025	3810									-
100	025	3911									-
100	025	4110									-
156	025	4118									-
169	025	3955									-
180	025	3116									-
180	025	3120									-
180	025	3130	1,471	expert training (environmental enforcement)				1,471			-
180	025	3318									-
180	025	3319									-
100	030	5010									-
100	030	5200									-
100	030	5810									-
100	030	5820									-

TRAINING IN PROFESSIONAL SERVICES
Proposed for 1995-96

Fund	Agency	Org	6110	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
100	030	5830									-
100	030	5840									-
100	030	5930									-
100	030	5940									-
100	030	7575									-
100	030	7690									-
150	030	6101									-
150	030	6102									-
150	030	6104									-
150	030	6105									-
150	030	6300									-
150	030	6400									-
150	030	6500									-
154	030	6220									-
158	030	5655									-
158	030	7631									-
161	030	6610									-
161	030	6700									-
167	030	6320									-
175	030	7390									-
175	030	7565	7,160	technical/customer svcs, cultural awareness, etc .			7,160				-
175	030	7566	3,600	consultation on Windows				3,600			-
175	030	7570									-
175	030	7585									-
175	030	7590									-
175	030	7600									-
175	030	7610									-
175	030	7630									-
240	030	5705									-
401	030	5901									-
401	030	5905									-
402	030	7990									-
403	030	7930									-
403	030	7935									-
403	030	7940									-
403	030	7945									-
403	030	7950									-
403	030	7960									-
403	030	7970									-
404	030	5950									-
410	030	5610									-
410	030	5630									-

TRAINING IN PROFESSIONAL SERVICES
Proposed for 1995-96

Fund	Agency	Org	6110	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
410	030	5640									-
100	050	7020									-
100	050	7050									-
100	050	7220									-
100	050	7400									-
100	050	7405									-
100	050	7410									-
100	050	7412									-
100	050	7415									-
100	050	7420									-
100	050	7440									-
100	050	7510									-
100	050	7512	63,000	RESULTS (38,000) and other outside training (25,000)	38,000						25,000
100	050	7650									-
100	050	9025									-
100	050	9203									-
100	050	9210									-
100	050	9250									-
100	050	9275									-
156	050	6900									-
156	050	9030									-
156	050	9035									-
400	050	7234									-
400	050	7234	116,416	employee assistance (84,000), drug & alcohol (6,600), fitness (21,216), yoga (4,600)			116,416				
400	050	7515									-
400	050	7561									-
162	080	8110									-
162	080	8120									-
162	080	8130									-
162	080	8140									-
162	080	8170									-
162	080	8201									-
162	080	8203									-
162	080	8204									-
162	080	8205									-
162	080	8207									-
162	080	8208									-
162	080	8209									-
162	080	8210									-
162	080	8211									-

TRAINING IN PROFESSIONAL SERVICES
Proposed for 1995-96

Fund	Agency	Org	6110	NOTES	RESULTS	Safety	Prof. Dev. / Mgmt	Computer	Technical	Conferences	Unspecified / Other
162	080	8212									-
162	080	8213									-
162	080	8217									-
162	080	8218									-
162	080	8310									-
162	080	8330									-
162	080	8340									-
162	080	8350									-
162	080	8410									-
162	080	8430									-
162	080	8445									-
162	080	8450									-
162	080	8455									-
162	080	8460									-
162	080	8501									-
162	080	8520									-
162	080	8525									-
162	080	8530									-
162	080	8535									-
162	080	8540									-
162	080	8545									-
162	080	8550									-
162	080	8555									-
162	080	8560									-
162	080	8565									-
162	080	8570									-
162	080	8575									-
162	080	8580									-
162	080	8585									-
162	080	8620									-
162	080	8650									-
162	080	8680									-
162	080	8690									-
362	080	8115									-
		TOTAL	418,895		81,800	-	171,576	18,481	14,600	-	132,438