ANNOTATED MINUTES

Tuesday, March 13, 1990 - 9:30 AM
Multnomah County Courthouse, Room 602

INFORMAL BRIEFINGS

1. Briefing regarding request of Association of Oregon Counties (AOC) for voluntary annual assessment to fund intensified staff on land use issues. Presented by Gordon Fultz and Russ Nebon

2. Annual update on Data Processing Management Committee Long Range Plan. Presented by Linda Alexander

3. Briefing on Children's Day Treatment for a joint proposal to fund day treatment services for children. Combining MED County General Funds with CSD Medicaid Funds through Intergovernmental Agreement. Presented by Gary Smith, Bill Carey, CSD; & Pam Patton, Morrison Center

4. Informal Review of Formal Agenda of March 15, 1990

Thursday, March 15, 1990 - 9:30 AM
Multnomah County Courthouse, Room 602

FORMAL AGENDA

Chair Gladys McCoy convened the meeting at 9:30 a.m., with Vice-Chair Gretchen Kafoury and Commissioners Pauline Anderson and Sharron Kelley present, and Commissioner Rick Bauman absent.

DEPARTMENT OF JUSTICE SERVICES

C-1 In the Matter of Approval of transfer of found, unclaimed or unidentified property (List 90 -2) from Sheriff's Office to the Department of General Services for disposal (destroy) as provided by Multnomah County Code 7.70

UPON MOTION OF COMMISSIONER ANDERSON, SECONDED BY COMMISSIONER KELLEY, CONSENT CALENDAR ITEM C-1 WAS UNANIMOUSLY APPROVED.

NON-DEPARTMENTAL

R-2 In the Matter of the Appointments of Teresa Kasner; and alternate Sharon Timko to the Oregon Tourism Alliance Visitor Services Committee

R-3 In the Matter of Appointments of Marie L. Dodds; and alternate Sharon Timko to the Oregon Tourism Alliance Marketing Committee

R-3a In the Matter of the Appointments of Sharon Timko; and alternate Deborah A. Sagen to the Attraction Development Committee

R-4 In the Matter of Re -Appointments of Pauline Anderson and Susie Lahsene to the Oregon Tourism Alliance Transportation Committee

UPON MOTION OF COMMISSIONER KAFOURY, SECONDED BY COMMISSIONER KELLEY, AGENDA ITEMS R-2 THROUGH R-4 WERE UNANIMOUSLY APPROVED.

DEPARTMENT OF ENVIRONMENTAL SERVICES

R-5 Order in the Matter of the Establishment of NW Reeder Rd. from Station 59+22.21, P.O.C., Northerly, to Station 72+05.95, E.C. as county road to be known as NW Reeder Road No. 4964

COMMISSIONER ANDERSON INTRODUCED BOB PEARSON. MR. PEARSON EXPLANATION. UPON MOTION OF COMMISSIONER ANDERSON, SECONDED BY COMMISSIONER KELLEY, ORDER 90-40 WAS UNANIMOUSLY APPROVED.

R-6 Order in the Matter of the Establishment of SE 160th Avenue from a point 220.00 feet south of SE Clay Street, said point being the end of SE 160th Avenue, County Road No. 3489, south 137.40 feet, as a county road to be known as SE 160th Avenue, No. 4946

UPON MOTION OF COMMISSIONER ANDERSON, SECONDED BY COMMISSIONER KELLEY, ORDER 90-41 WAS UNANIMOUSLY APPROVED.

PUBLIC CONTRACT REVIEW BOARD

(Recess as the Board of County Commissioners and convene as the Public Contract Review Board)

R-7 Order in the Matter of an Exemption from Public Bidding to Exceed the 20% Limitation on Contract Change Orders for the Courthouse Rooms Project

UPON MOTION OF COMMISSIONER KAFOURY, SECONDED BY COMMISSIONER KELLEY, ORDER 90-42 WAS UNANIMOUSLY APPROVED.

(Recess as the Public Contract Review Board and reconvene as the Board of County Commissioners)

DEPARTMENT OF GENERAL SERVICES

R-8 In the Matter of a request for execution of the contract amendment between the County and AFSCME Local 88 regarding the transfer of Library Association of Portland employees effective July 1, 1990

COMMISSIONER ANDERSON INTRODUCED KENNETH UPTON. MR. UPTON EXPLANATION. UPON MOTION OF COMMISSIONER ANDERSON, SECONDED BY COMMISSIONER KELLEY, R-8 WAS UNANIMOUSLY APPROVED. ARLENE COLLINS OF AFSCME ARRIVED LATE AND PRESENTED TESTIMONY IN SUPPORT.

NON-DEPARTMENTAL

R-9 First Reading - An Ordinance in the Matter of repealing Multnomah County Code chapter 6.80 and adopting Multnomah County Code chapter 6.81 regulating occasional secondhand dealers and secondhand dealers

ORDINANCE READ BY TITLE ONLY. COPIES AVAILABLE. MARGARET BAX AND COMMISSIONER KAFOURY PRESENTATION AND INTRODUCTION. COMMISSIONER KAFOURY MOVED AND COMMISSIONER ANDERSON SECONDED, APPROVAL OF THE FIRST READING. DENNIS NELSON, LT. PAT NELSON, JAMES GRAVELLE LT. CLYDE STITES EXPLANATION,

TESTIMONY IN SUPPORT AND RESPONSE TO BOARD QUESTIONS. WALLACE WARNER, LESLIE JO GOLDSMITH, CURTIS CAMPBELL AND JODI TOMKINS TESTIMONY IN SUPPORT. ASSISTANT COUNTY COUNSEL SANDRA DUFFY EXPLANATION OF TECHNICAL AMENDMENTS MADE TO PAGES 14, 15, 17, 19 AND 27. UPON MOTION OF COMMISSIONER KAFOURY, SECONDED BY COMMISSIONER KELLEY, SUBSTITUTION OF THE AMENDED ORDINANCE WAS UNANIMOUSLY APPROVED. COMMISSIONERS KAFOURY, McCOY, ANDERSON AND KELLEY COMMENTS IN SUPPORT AND APPRECIATION FOR WORK OF TASKFORCE. FIRST READING UNANIMOUSLY APPROVED. SECOND READING OF ORDINANCE, AS SUBSTITUTED, SCHEDULED FOR THURSDAY, MARCH 22, 1990.

The regular meeting was adjourned at 10:20 a.m. and the work session convened at 10:30 a.m.

Thursday, March 15, 1990 - Following Formal
Multnomah County Courthouse, Room 602

WORK SESSION

1. Work Session Regarding Multnomah County Restitution Center (MCRC) and Correctional Alternatives

CANCELLED.

2. Work Session Regarding Proposal for Change to Current County Organizational Structure

BOARD DISCUSSION OF CHAIR McCOY AND SHERIFF SKIPPER PROPOSED HUMAN SERVICES AND JUSTICE SERVICES REORGANIZATION OPTIONS WITH CHAIR McCOY, GRANT NELSON, SHERIFF SKIPPER, BILL WOOD, GARY WALKER, JUDY PHELAN, BILL SLYTER, HAROLD AMIDON AND LINDA ALEXANDER. STAFF DIRECTED TO PREPARE

INFORMATION CONCERNING MANAGEMENT ANALYSIS AND BUDGETARY IMPACT FOR BOARD CONSIDERATION PRIOR TO SECOND WORK SESSION SCHEDULED FOR 1:30 P.M., THURSDAY, MARCH 29, 1990.

There being no further business, the meeting was adjourned at 11:35 a.m.

OFFICE OF THE BOARD CLERK
FOR MULTNOMAH COUNTY, OREGON

Deborah L. Bogstad

Deborah L. Bogstad

MULTNOMAH COUNTY OREGON

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

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

AGENDA OF

MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS

FOR THE WEEK OF

March 12 - 16, 1990

* * NOTE: Informal Review, Tuesday, March 13, 1990 in AM * *

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

Thursday, 10:00 PM, Channel 11 for East and West side subscribers
Friday, 6:00 PM, Channel 27 for Paragon Cable (Multnomah East) subscribers
Saturday 12:00 PM, Channel 21 for East Portland and East County subscribers

Tuesday, March 13, 1990 - 9:30 AM

Multnomah County Courthouse, Room 602

INFORMAL BRIEFINGS

1. Briefing regarding request of Association of Oregon Counties (AOC) for voluntary annual assessment to fund intensified staff on land use issues. Presented by Gordon Fultz and Russ Nebon - **Time Certain 9:30 AM**

2. Annual update on Data Processing Management Committee Long Range Plan. Presented by Linda Alexander

3. Briefing on Children's Day Treatment for a joint proposal to fund day treatment services for children. Combining MED County General Funds with CSD Medicaid Funds through Intergovernmental Agreement. Presented by Gary Smith, Bill Carey, CSD; & Pam Patton, Morrison Center

4. Informal Review of Formal Agenda of **March 15, 1990**

PUBLIC TESTIMONY WILL NOT BE TAKEN AT INFORMAL MEETINGS

Thursday, March 15, 1990, 9:30 AM

Multnomah County Courthouse, Room 602

Formal Agenda

CONSENT CALENDAR

DEPARTMENT OF JUSTICE SERVICES

C-1 In the Matter of Approval of transfer of found, unclaimed or unidentified property (List 90-2) from Sheriff's Office to the Department of General Services for disposal (destroy) as provided by Multnomah County Code 7.70

REGULAR AGENDA

NONDEPARTMENTAL

R-2 In the Matter of the Appointments of Teresa Kasner; and alternate Sharon Timko to the Oregon Tourism Alliance Visitor Services Committee

R-3 In the Matter of Appointments of Marie L. Dodds; and alternate Sharon Timko to the Oregon Tourism Alliance Marketing Committee

R-4 In the Matter of Re-Appointments of Pauline Anderson and Susie Lahsene to the Oregon Tourism Alliance Transportation Committee

DEPARTMENT OF ENVIRONMENTAL SERVICES

R-5 Order in the Matter of the Establishment of N.W. Reeder Rd. from Station 59+22.21, P.O.C., Northerly, to Station 72+05.95, E.C. as county road to be known as N.W. Reeder Road No. 4964

R-6 Order in the Matter of the Establishment of S.E. 160th Avenue from a point 220.00 feet south of S.E. Clay Street, said point being the end of S.E. 160th Avenue, County Road No. 3489, south 137.40 feet, as a county road to be known as S.E. 160th Avenue, No. 4946

PUBLIC CONTRACT REVIEW BOARD

(Recess as the Board of County Commissioners and convene as the Public Contract Review Board)

R-7 Order in the Matter of an Exemption from Public Bidding to Exceed the 20% Limitation on Contract Change Orders for the Courthouse Rooms Project

(Recess as the Public Contract Review Board and reconvene as the Board of County Commissioners)

DEPARTMENT OF GENERAL SERVICES

R-8 In the Matter of a request for execution of the contract amendment between the County and AFSCME Local 88 regarding the transfer of Library Association of Portland employees effective July 1, 1990

NONDEPARTMENTAL

R-9 First Reading - An Ordinance in the Matter of repealing Multnomah County Code chapter 6.80 and adopting Multnomah County Code chapter 6.81 regulating occasional second hand dealers and second hand dealers

* *

Thursday, March 15, 1990 - Following Formal

Multnomah County Courthouse, Room 602

WORK SESSION

Work Session Regarding Multnomah County Restitution Center (MCRC) and Correctional Alternatives

0700C.65-68

SUPPLEMENTAL AGENDA

Thursday, March 15, 1990 - 9:30 AM

R-3a In the Matter of the Appointments of Sharon Timko; and alternate Deborah A. Sagen to the Attraction Development Committee

0700C.69

MULTNOMAH COUNTY OREGON

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

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

SUPPLEMENTAL AGENDA

Thursday, March 15, 1990 - Following Formal

Multnomah County Courthouse, Room 602

WORK SESSION

1. Work Session Regarding Multnomah County Restitution Center (MCRC) and Correctional Alternatives

CANCELLED

2. Work Session Regarding Proposal for Change to Current County Organizational Structure

SCHEDULED

0700C.70
cap

Time Certain 9:30 AM

DATE SUBMITTED _____

(For Clerk's Use)
Meeting Date MAR 13 1990
Agenda No. Info #1

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: AOC Land Use Program

Informal Only* March 13 (Date) Formal Only _____ (Date)

DEPARTMENT BCC (Anderson) DIVISION _____

CONTACT Diane Luther TELEPHONE x5008

*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Gordon Fultz and Russ Nebon

BRIEF SUMMARY Should include other alternatives explored, if applicable, and clear statement of rationale for the action requested.

Briefing regarding request of Association of Oregon Counties for voluntary annual assessment to fund intensified staff on land use issues.

(IF ADDITIONAL SPACE IS NEEDED, PLEASE USE REVERSE SIDE)

ACTION REQUESTED:

☐ INFORMATION ONLY ☐ PRELIMINARY APPROVAL ☒ POLICY DIRECTION ☐ APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 15 minutes

IMPACT:

PERSONNEL

☒ FISCAL/BUDGETARY If approved will require contingency tap at next quarterly review, and subsequent annual appropriations.

☐ -General Fund

Other _____

ISSD MAR -7 AM 11:24
BOARD OF COUNTY COMMISSIONERS
CLACKAMAS COUNTY, OREGON

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: Pauline Anderson

BUDGET / PERSONNEL _____ /

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) _____

OTHER _____
(Purchasing, Facilities Management, etc.)

NOTE: If requesting unanimous consent, state situation requiring emergency action on back.

2-9 PA ≤ DL — BCC

ASSOCIATION OF OREGON COUNTIES
LOCAL GOVERNMENT CENTER 1201 COURT STREET N.E., P.O. BOX 12729, SALEM, OREGON 97309-0729, (503) 585-8351

Mail to Pauline Anderson - FRN

February 1, 1990

GLADYS McCOY
MULTNOMAH COUNTY CHAIR
1021 S.W. 4th, ROOM 134
PORTLAND, OREGON 97204

2/2/90
PRN

1990 FEB -2 AM 10:57
BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON

$1600
FY89-90

To: Multnomah County Board of Commissioners

From: P. Jerry Orrick, Executive Director

Subject: Land Use Assessment

We have prepared the enclosed billing statement to reflect your county's proportionate share of a voluntary assessment established by the AOC Board of Directors to fund an intensified staff effort on land use issues.

To help explain what this is all about we have also enclosed a packet of material which include a copy of the proposal that was approved by the Board on January 12, 1990, a summary of the 1989 program and a work plan for 1990.

If you are inclined to provide support to this effort but cannot find adequate funds in your current budget, you may wish to add the amount to your 1990-91 budget and pay the assessment after July 1. However, if you use this approach, let me emphasize that this is intended to be an ongoing program involving similar assessments each year. Your next billing would come in January 1991, so you may wish to consider providing for two calendar year payments in your upcoming budget. This would certainly help us avoid a cash flow problem in future years.

Please complete and return the response form on the lower half of the enclosed billing statement. Your early response would be very helpful in preparing our revenue and cash flow projections for the program.

Thank you for your consideration.

cc: County Planning Directors

Enclosures: Billing Statement
Board Letter
1988-89 Land Use Program Summary
1990 Work Plan

ec

ASSOCIATION OF OREGON COUNTIES
LOCAL GOVERNMENT CENTER 1201 COURT STREET N.E., P.O. BOX 12729, SALEM, OREGON 97309-0729, (503) 585-8351

February 1, 1990

To: Multnomah County Board of Commissioners

From: Association of Oregon Counties

B I L L I N G S T A T E M E N T

VOLUNTARY LAND USE ASSESSMENT $2,102

(Please make check payable to Association of Oregon Counties and mail to the address indicated above)

(Please detach and return lower portion)

R E S P O N S E F O R M

To: Association of Oregon Counties

From: Multnomah County Board of Commissioners

Subject: Land Use Assessment

Our response to your land use assessment program is as follows:

/__/ Our remittance is enclosed

/__/ We will remit payment on or about _____.
(date)

/__/ We have decided not to participate at this time because:

_____

_____

By: _____

Date: _____

att. F

ASSOCIATION OF OREGON COUNTIES
LOCAL GOVERNMENT CENTER 1201 COURT STREET N.E., P.O. BOX 12729, SALEM, OREGON 97309-0729, (503) 585-835

January 12, 1990

TO: Board of Directors

FROM: P. Jerry Orrick, Executive Director

SUBJECT: Land Use Staffing and Funding Proposal

Pursuant to your instructions, your special subcommittee consisting of Dave Bishop, Bonnie Hays, and Jerry Peck submits for your consideration the following proposals to intensify AOC representation in land use issues.

STAFFING

The recommended plan is to contract with Marion County for the services of Russ Nebon on a quarter-time basis during the interim to perform those needed services outlined in the planning directors' association letter to our Board (copy attached). Contrary to earlier reports, Marion County would agree to such an arrangement. The major advantage is that Nebon already has the expertise and credibility that would take a new person years to acquire. The disadvantage is that Nebon's availability beyond the interim is unknown at this time.

FUNDING

Twenty-five percent of Nebon's time, clerical support and expenses would cost about $18,000 per year. The funds could be raised through annual voluntary special assessments on all counties, much as we did for the '89 legislative session. As proposed, however, this assessment would be different. It would be based on unincorporated area population and privately owned land in each county. Assessment rates would be 3 cents per capita plus 3 cents per hundred acres with a minimum payment of $300 per county and a maximum of $3,000. Please see attached assessment formula for county by county details.

Total assessments would be $36,853. However, since some counties might not participate, it would be more realistic to assume total revenues of about $32,000. As proposed, $18,000 would be paid to Marion County for 1990, with the balance ($14,000) being held in reserve. In 1991 we could again assess counties the same amount to yield another $32,000, to which we would add the previous years reserve of $14,000 to total $46,000, which would be needed to fund a more intensive (half time) staffing effort during 1991 and the legislative session.

In the 1991-93 and future biennia we could follow the same system. The advantage is that each county's assessment would remain stable from year to year, while the AOC could flex from a quarter-time effort in off session years to a half-time person during legislative years. Of course, the overall success of such a plan is dependent on the availability of a highly experienced, trusted, and competent staff person, such as Russ Nebon. Someone without those qualifications would be unable to accomplish anything worthwhile within such limited time constraints. And, of course, there is the problem of finding such a person who could be available at all times to do only part-time work. But then, the most obvious option is a full-time person who would cost $70,000 to $80,000 per year (compensation and operational costs), which is, apparently, more of a financial commitment than counties are willing to make at this time.

js

Encl.

LAND USE PROGRAM
ASSESSMENT FORMULA

County	Population (uninc.) 1988	Assessment per capita @ 3 cents	Acreage (private lands)	Assessment per 100 acres @ 3 cents	ADJUSTED ASSESSMENT $300/$3000
Baker	4,032	$121	933,813	$280	$401
Benton	23,889	717	340,306	102	819
Clackamas	151,885	4,557	636,447	191	3,000
Clatsop	12,595	378	462,349	139	517
Columbia	19,675	590	383,635	115	705
Coos	24,285	729	724,812	217	946
Crook	7,890	237	929,738	279	516
Curry	11,580	347	402,775	121	468
Deschutes	42,010	1,260	408,766	123	1,383
Douglas	54,305	1,629	1,603,325	481	2,110
Gilliam	670	20	745,747	224	300
Grant	2,880	86	1,139,888	342	428
Harney	3,080	92	1,426,445	428	520
Hood River	11,135	334	95,474	29	363
Jackson	59,080	1,772	574,669	172	1,944
Jefferson	8,615	258	693,361	208	466
Josephine	45,820	1,375	391,040	117	1,492
Klamath	37,585	1,128	1,689,359	507	1,635
Lake	4,230	127	1,164,275	349	476
Lane	98,115	2,943	1,301,606	390	3,000
Lincoln	16,330	490	397,782	119	609
Linn	35,166	1,055	890,307	267	1,322
Malheur	11,810	354	1,541,299	462	816
Marion	76,420	2,293	494,711	148	2,441
Morrow	3,255	98	1,124,049	337	435
Multnomah	68,145	2,044	192,753	58	2,102
Polk	15,105	453	417,245	125	578
Sherman	715	21	478,469	144	300
Tillamook	13,000	390	255,469	77	467
Umatilla	18,425	553	1,538,312	461	1,014
Union	5,765	173	673,649	202	375
Wallowa	2,945	88	862,382	259	347
Wasco	8,375	251	911,639	273	524
Washington	150,790	4,524	396,343	119	3,000
Wheeler	485	15	834,655	250	300
Yamhill	20,645	619	383,881	115	734
TOTALS	1,070,732	$32,121	27,440,775	$8,230	$36,853

Association of Oregon Counties
Land Use Program
1988-89 Summary

For 10 months in 1988/89 AOC enhanced staff by contracting with Marion County for a half-time land use specialist (Chief Planner, Russ Nebon). He presented the Counties' interests during the LCDC rule making process and before the legislature. This required close coordination with the County Planning Directors, the AOC Legislative and Land Use Committees and AOC staff. The County Planning Directors recommend that this staffing arrangement be continued to maintain continuing representation at interim legislative committee and LCDC meetings. The following description of some of his efforts illustrates the need for technical expertise to adequately represent counties interests in land use matters.

In the LCDC arena he was a member of the task force that developed specific criteria for identification of Secondary Lands. Strenuous opposition was presented on LCDC's proposal to mandate tighter EFU zoning requirements. He testified on, and helped develop amendments to, the proposed Goal 4 amendments and rules.

In the legislative arena AOC identified four land use priorities for the 1989 Legislative Session.

1. Eliminate the opportunity to appeal issues not raised at the local level.
2. Narrow the definition of land use decision.
3. Modify LCDC enforcement procedures.
4. Ensure adequate LCDC funding to support mandatory local planning.

To gain support for the "raise it or waive it" provisions local government agreed to include in the bill (HB 2288) new procedural requirements for land use hearings. Case law was used as the basis for changing the definition of land use decision. And, before LCDC can be asked to adopt an enforcement order the bill requires that the affected local government be notified and have an opportunity to respond. Extensive negotiations with special interests and legislators were involved before this and a number of other land use bills were passed.

He testified before the Ways and Means Committee on the LCDC budget suggesting that work priorities be concentrated on unresolved issues affecting counties. The Committee added budget notes requiring legislative review prior to adoption of new Goal 4 rules, the Secondary Lands pilot program and subsequent Secondary Lands rules. Funds were allocated for the Secondary Lands Program and a study of urban growth management issues ($242,150 each). DLCD agreed to adjust the periodic review notice schedule and to allow extensions of periodic review deadlines. These budget notes made it clear the LCDC must concentrate on completion of state agency coordination and the Secondary Lands program.

Please call Russ (588-5038) if you have questions about 1989 land use legislation or his work as AOC land use specialist.

ASSOCIATION OF OREGON COUNTIES

1990 WORK PROGRAM

LAND USE SPECIALIST

1. Represent AOC at all LCDC meetings from gavel to gavel. Analyze agenda packet, prepare and present testimony on all issues of interest to counties.

2. Represent AOC at Legislative Interim Land Use Committee meetings. Prepare and present testimony on all issues of interest to counties.

3. Coordinate policy issues with county officials, AOC Land Use and Legislative Committees, AOC Board of Directors.

4. Prepare written land use issues update for the fall AOC District meetings.

5. Provide continuing coordination with County Planning Directors and County Counsels Associations to identify and analyze current land use issues.

6. Provide technical assistance and support at LCDC Local Official Advisory Committee meetings.

7. Work with LCDC staff in developing proposed administrative rules consistent with county policy on appropriate planning requirements for rural communities.

8. Participate on Interim Land Use Committee work group to correct 1989 legislation mandating inappropriate land use enforcement requirements.

9. Monitor Secondary Lands Testing: provide technical assistance, review submittals and LCDC report, prepare and present AOC position.

10. Work with LCDC staff on legislation simplifying periodic review consistent with AOC policy direction .

11. Prepare draft legislation allowing counties opportunity to defer to state agencies for regulation of Goal 5 resources.

12. Propose changes when other legislative proposals are inconsistent with AOC land use objectives.

13. Provide requested technical assistance to individual county commissioners, planners and county counsels.

ASSOCIATION OF OREGON COUNTIES
LOCAL GOVERNMENT CENTER 1201 COURT STREET N.E., P.O. BOX 12729, SALEM, OREGON 97309-0729, (503) 585-8351

February 1, 1990

To: Multnomah County Board of Commissioners

From: P. Jerry Orrick, Executive Director

Subject: Land Use Assessment

We have prepared the enclosed billing statement to reflect your county's proportionate share of a voluntary assessment established by the AOC Board of Directors to fund an intensified staff effort on land use issues.

To help explain what this is all about we have also enclosed a packet of material which include a copy of the proposal that was approved by the Board on January 12, 1990, a summary of the 1989 program and a work plan for 1990.

If you are inclined to provide support to this effort but cannot find adequate funds in your current budget, you may wish to add the amount to your 1990-91 budget and pay the assessment after July 1. However, if you use this approach, let me emphasize that this is intended to be an ongoing program involving similar assessments each year. Your next billing would come in January 1991, so you may wish to consider providing for two calendar year payments in your upcoming budget. This would certainly help us avoid a cash flow problem in future years.

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Thank you for your consideration.

cc: County Planning Directors

Enclosures: Billing Statement
Board Letter
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1990 Work Plan

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Att. F

ASSOCIATION OF OREGON COUNTIES
LOCAL GOVERNMENT CENTER 1201 COURT STREET N.E., P.O. BOX 12729, SALEM, OREGON 97309-0729, (503) 585-8351

January 12, 1990

TO: Board of Directors

FROM: P. Jerry Orrick, Executive Director

SUBJECT: Land Use Staffing and Funding Proposal

Pursuant to your instructions, your special subcommittee consisting of Dave Bishop, Bonnie Hays, and Jerry Peck submits for your consideration the following proposals to intensify AOC representation in land use issues.

STAFFING

The recommended plan is to contract with Marion County for the services of Russ Nebon on a quarter-time basis during the interim to perform those needed services outlined in the planning directors' association letter to our Board (copy attached). Contrary to earlier reports, Marion County would agree to such an arrangement. The major advantage is that Nebon already has the expertise and credibility that would take a new person years to acquire. The disadvantage is that Nebon's availability beyond the interim is unknown at this time.

FUNDING

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js

Encl.

Association of Oregon Counties

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ASSESSMENT FORMULA

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Clatsop	12,595	378	462,349	139	517
Columbia	19,675	590	383,635	115	705
Coos	24,285	729	724,812	217	946
Crook	7,890	237	929,738	279	516
Curry	11,580	347	402,775	121	468
Deschutes	42,010	1,260	408,766	123	1,383
Douglas	54,305	1,629	1,603,325	481	2,110
Gilliam	670	20	745,747	224	300
Grant	2,880	86	1,139,888	342	428
Harney	3,080	92	1,426,445	428	520
Hood River	11,135	334	95,474	29	363
Jackson	59,080	1,772	574,669	172	1,944
Jefferson	8,615	258	693,361	208	466
Josephine	45,820	1,375	391,040	117	1,492
Klamath	37,585	1,128	1,689,359	507	1,635
Lake	4,230	127	1,164,275	349	476
Lane	98,115	2,943	1,301,606	390	3,000
Lincoln	16,330	490	397,782	119	609
Linn	35,166	1,055	890,307	267	1,322
Malheur	11,810	354	1,541,299	462	816
Marion	76,420	2,293	494,711	148	2,441
Morrow	3,255	98	1,124,049	337	435
Multnomah	68,145	2,044	192,753	58	2,102
Polk	15,105	453	417,245	125	578
Sherman	715	21	478,469	144	300
Tillamook	13,000	390	255,469	77	467
Umatilla	18,425	553	1,538,312	461	1,014
Union	5,765	173	673,649	202	375
Wallowa	2,945	88	862,382	259	347
Wasco	8,375	251	911,639	273	524
Washington	150,790	4,524	396,343	119	3,000
Wheeler	485	15	834,655	250	300
Yamhill	20,645	619	383,881	115	734
TOTALS	1,070,732	$32,121	27,440,775	$8,230	$36,853

association of oregon county planning directors

August 31, 1989

Mr. Jerry Orrick, Executive Director
Association of Oregon Counties
P.O. Box 12729
Salem, OR 97309-0729

Re: Proposal for Staff Allocation for Land Use in AOC Budget

Dear Jerry:

Roy Burns has shared the attached referenced proposal with members of the Association. While neither the Board nor the Associations' membership has conducted a detailed review of the proposal, the consensus of the Board members is that the need for a continued presence before the Land Conservation and Development Commission and legislative committees will be critical during the interim. It appears that perceptions and framework for land use policy has been set more during the interim then during the actual legislative session over the last several years.

The County Planners, as an organization has not been able to provide the level of monitoring oversite suggested in the proposal. The priorities for local planning administration set by County Boards of Commissioners and County Courts do not always allow for County Planners to effectively participate in the rule making process. The continuing series of meetings which have become characteristic of the LCDC rule and goal amendment processes are too much of a burden and beyond the capabilities of individual counties. The Association also does not have the fee base to provide for staff support.

I would encourage you and the AOC Board to closely consider a proposal to provide resources within the AOC budget for professional staffing of land use issues on an ongoing basis. The scope of the services to be provided and the amount of resources necessary needs to be refined. I and other County Planners would welcome the opportunity to assist the AOC staff and Board in further evaluation and refinement of the proposal or other alternatives which can achieve similar objectives.

Sincerely,

Gary Munsterman

Gary Munsterman, President

Attachment

c Bill VanVactor, Lane County Counsel
Bill Rogers, AOC President
County Planners

L0199/I

M E M O R A N D U M

TO: AOCPD

FROM: Roy Burns, Lane County

SUBJECT: Representation of County Position on Matters Related to Land Use

DATE: 8-23-89

BACKGROUND:

Since my appointment as County Planning Director for Lane County in 1983, I have observed numerous meetings of the Land Conservation and Development Commission (LCDC) and the Joint Interim Committee on Land Use (JICLU). I have also attended Legislative Committee meetings dealing with proposed legislation affecting land use during the 83, 85, 87, and 89 Legislative Assemblies.

My observations have led me to conclude that major emphasis is concentrated during the Legislative Assembly, and is not continued during interim time periods with either JICLU or LCDC.

Mr. William VanVactor, Lane County Counsel, and I have proposed that the Association of Oregon Counties assume a major role for working with LCDC and JICLU during the interim.

To justify why AOC should become involved, I have included the following LCDC actions:

A) Secondary Lands Pilot Project:

Not approved! Robert Liberty, 1000 Friends, spoke and was opposed to the staff proposal because there was no parallel requirement for more restrictive Primary Zones. After all the "Heat" LCDC took in the Legislature, you would think they would say go fly a kite Robert! But, no. Roger Hamlin, LCDC Commissioner, sees no need for Secondary Lands, only more restrictive Primary Zones. Virigina Burdick, LCDC Commissioner, believes there has to be linkage to Primary Zones. Roger Hamlin doesn't think the Counties will do their share. They'll waste the money, and then ask for more. Susan Brody, DLCD Director, changed her recommendation to no "action". She will return in September with specific intergovernmental contracts for the three counties and address in the pilot project linkage to the Primary Zones.

B) EFU Reporting:

LCDC did not approve the staff report. Once again, Robert Liberty testified inferring that Counties were not being totally truthful (withholding approval information). Also, if a County did not submit findings, Robert interprets that as "no findings", which is a statutory violation. LCDC decided to only forward the EFU report to the JICLU, without approval, and expressly stated that without an audit capability, they have no idea whether the Countys' reports are accurate. I suspect this will not be well received by the JICLU.

A 1000 Friend's intern reported to Robert that about 36 approvals had not been reported by Clackamas County. Robert admitted the intern could have been in error, i.e., forest dwellings rather than farm. LCDC was eager to believe him. They directed staff to investigate, and then drafted the disclaimer language in the transmittal letter to the JICLU discussed above.

As you know, JICLU will be evaluating "enforcement" procedures, pursuant to H.B. 2682, as one of the work task assignments during the interim. A number of other vital issues for counties will be discussed.

PROPOSED ACTION:

AOCPD recommends to the AOC Board of Directors, on September 8, 1989, the following action:

A) LCDC:

1) Budget for personnel within the annual dues of AOC, to provide for the coordination of land use matters for counties.

2) The work plan to include the following elements:

a) AOC assign staff member to be on the LCDC mailing list of packet materials for all LCDC meetings.

b) Prior to each LCDC meeting, the AOC staff person shall meet with Planning Directors and County Counsels as appropriate to discuss the agendas, and to assign agenda items for action.

c) Assign County Commissioners from each LCDC district to meet with their Commissioner member before each LCDC meeting to provide AOC positions on every agenda item affecting Counties.

d) AOC personnel shall provide gavel to gavel coverage of all LCDC meetings, and coordinate efforts of assigned

County Counsels or Planning Directors.

e) AOC employee, or assigned County staff, should testify on each item for which there is an opportunity for public comment and which has some affect on counties.

f) AOC shall mail out minutes of the LCDC meeting and action taken to all County Commissioners, Planning Directors, and County Counsels.

B) JICLU:

1) AOC assign staff to be placed on the notice/mailing list of JICLU.

2) AOC assign staff to conduct a work program identical that provided for LCDC.

C) AOC:

1) Provide routine staff assistance to the AOC Land Use Committee.

2) Provide routine staff assistance to AOC Board of Directors.

3) Provide staff liaison coordination and assistance for County Counsels and Planning Directors with AOC.

RLB/jbw

c.c. Jacqlyn Mikalonis
Bill VanVactor
Bill Rogers

Association of Oregon Counties
Land Use Program
1988-89 Summary

For 10 months in 1988/89 AOC enhanced staff by contracting with Marion County for a half-time land use specialist (Chief Planner, Russ Nebon). He presented the Counties' interests during the LCDC rule making process and before the legislature. This required close coordination with the County Planning Directors, the AOC Legislative and Land Use Committees and AOC staff. The County Planning Directors recommend that this staffing arrangement be continued to maintain continuing representation at interim legislative committee and LCDC meetings. The following description of some of his efforts illustrates the need for technical expertise to adequately represent counties interests in land use matters.

In the LCDC arena he was a member of the task force that developed specific criteria for identification of Secondary Lands. Strenuous opposition was presented on LCDC's proposal to mandate tighter EFU zoning requirements. He testified on, and helped develop amendments to, the proposed Goal 4 amendments and rules.

In the legislative arena AOC identified four land use priorities for the 1989 Legislative Session.

1. Eliminate the opportunity to appeal issues not raised at the local level.
2. Narrow the definition of land use decision.
3. Modify LCDC enforcement procedures.
4. Ensure adequate LCDC funding to support mandatory local planning.

To gain support for the "raise it or waive it" provisions local government agreed to include in the bill (HB 2288) new procedural requirements for land use hearings. Case law was used as the basis for changing the definition of land use decision. And, before LCDC can be asked to adopt an enforcement order the bill requires that the affected local government be notified and have an opportunity to respond. Extensive negotiations with special interests and legislators were involved before this and a number of other land use bills were passed.

He testified before the Ways and Means Committee on the LCDC budget suggesting that work priorities be concentrated on unresolved issues affecting counties. The Committee added budget notes requiring legislative review prior to adoption of new Goal 4 rules, the Secondary Lands pilot program and subsequent Secondary Lands rules. Funds were allocated for the Secondary Lands Program and a study of urban growth management issues ($242,150 each). DLCD agreed to adjust the periodic review notice schedule and to allow extensions of periodic review deadlines. These budget notes made it clear the LCDC must concentrate on completion of state agency coordination and the Secondary Lands program.

Please call Russ (588-5038) if you have questions about 1989 land use legislation or his work as AOC land use specialist.

ASSOCIATION OF OREGON COUNTIES

1990 WORK PROGRAM

LAND USE SPECIALIST

1. Represent AOC at all LCDC meetings from gavel to gavel. Analyze agenda packet, prepare and present testimony on all issues of interest to counties.

2. Represent AOC at Legislative Interim Land Use Committee meetings. Prepare and present testimony on all issues of interest to counties.

3. Coordinate policy issues with county officials, AOC Land Use and Legislative Committees, AOC Board of Directors.

4. Prepare written land use issues update for the fall AOC District meetings.

5. Provide continuing coordination with County Planning Directors and County Counsels Associations to identify and analyze current land use issues.

6. Provide technical assistance and support at LCDC Local Official Advisory Committee meetings.

7. Work with LCDC staff in developing proposed administrative rules consistent with county policy on appropriate planning requirements for rural communities.

8. Participate on Interim Land Use Committee work group to correct 1989 legislation mandating inappropriate land use enforcement requirements.

9. Monitor Secondary Lands Testing: provide technical assistance, review submittals and LCDC report, prepare and present AOC position.

10. Work with LCDC staff on legislation simplifying periodic review consistent with AOC policy direction .

11. Prepare draft legislation allowing counties opportunity to defer to state agencies for regulation of Goal 5 resources.

12. Propose changes when other legislative proposals are inconsistent with AOC land use objectives.

13. Provide requested technical assistance to individual county commissioners, planners and county counsels.

DATE SUBMITTED February 28, 1990

(For Clerk's Use)
Meeting Date MAR 13 1990
Agenda No. Ref. # 2

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Data Processing Management Committee Long Range Plan

Informal Only* March 13, 1990 (Date) Formal Only _____ (Date)

DEPARTMENT General Services DIVISION ISD

CONTACT Jim Munz TELEPHONE 3749

*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Linda Alexander

BRIEF SUMMARY Should include other alternatives explored, if applicable, and clear statement of rationale for the action requested.

Presentation of annual update to the DPMC Long Range Plan

(IF ADDITIONAL SPACE IS NEEDED, PLEASE USE REVERSE SIDE)

ACTION REQUESTED:

☒ INFORMATION ONLY ☐ PRELIMINARY APPROVAL ☐ POLICY DIRECTION ☐ APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 20 minutes

IMPACT:

PERSONNEL

☐ FISCAL/BUDGETARY

☐ -General Fund

Other _____

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1990 MAR -7 AM 9:27

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: Linda D. Alexander

BUDGET / PERSONNEL _____

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) _____

OTHER _____
(Purchasing, Facilities Management, etc.)

NOTE: If requesting unanimous consent, state situation requiring emergency action on back.

MULTNOMAH COUNTY OREGON

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY
PAULINE ANDERSON
GRETCHEN KAFOURY
RICK BAUMAN
SHARRON KELLEY

DEPARTMENT OF GENERAL SERVICES
PORTLAND BUILDING
1120 SW FIFTH, 14TH FLOOR
PORTLAND, OR 97204-1934

AT OTHER LOCATIONS:

OFFICE OF THE DIRECTOR	(503) 248-3303
EMPLOYEE SERVICES	(503) 248-5015
FINANCE	(503) 248-3312
LABOR RELATIONS	(503) 248-5135
PLANNING & BUDGET	(503) 248-3883
ADMINISTRATIVE SERVICES	(503) 248-5111
ASSESSMENT & TAXATION	(503) 248-3345
ELECTIONS	(503) 248-3720
INFORMATION SERVICES	(503) 248-3749

MEMORANDUM

TO: Board of County Commissioners
Department Managers
Sheriff Bob Skipper
District Attorney Michael Schrunk

FROM: Linda Alexander, Director
Department of General Services

DATE: March 13, 1990

SUBJECT: GIS

Jim Munz provided the attached information on the geographic information systems direction within Multnomah County and the State. This is a topic we discussed in the planning process which has regional impact.

The important points for Multnomah County are that:

- We are the exclusive supplier of all official maps.
- The City of Portland, major utilities, and the State, as well as our County, have adopted the same hardware and software standards.
  - We can supply automated base maps to the City of Portland, and they can overlay crime data or incident locational data; the Water Bureau can overlay lines, sewers, etc.
  - The State can create transportation data for comprehensive planning.
- However, when we supply Metro with our official maps:
  - They must first convert them to their mapping software.
  - Then they can overlay their planning software on them.

I hope this information is helpful and informative. Our agreement with the State is a long-term agreement, and we're in the third year. Until the project is complete we will continue to supply manually-generated official maps to all those who require them.

36ADM/LA/lb

Attachment

MULTNOMAH COUNTY OREGON

DEPARTMENT OF GENERAL SERVICES
INFORMATION SERVICES DIVISION
4747 EAST BURNSIDE
PORTLAND, OREGON 97215
(503) 248-3749

GLADYS McCOY
COUNTY CHAIR OF THE BOARD

TO: Linda Alexander, Director
Department of General Services

FROM: Jim Munz, Manager
Information Services Division

DATE: January 11, 1990

SUBJECT: GEOGRAPHIC INFORMATION SYSTEMS DIRECTION

I was delighted to see that the Oregonian has somehow become aware of the potential benefits of a Geographic Information System (GIS) in the local area (see attached). I was disappointed however, to see that they failed to research the issue to any level of detail and as a result, offer a suggested approach that is not only technically unsound but conflicts with the direction established by the State of Oregon and would probably require changes to Oregon State Law before it could be implemented.

The significant fact that the Oregonian failed to discover is that the State of Oregon has one of the most progressive programs in the United States for developing and maintaining geographic land information records. In 1952, the State Legislature authorized the State Tax Commission to install and assist in the preparation and maintenance of map standards, cadastral maps, and standard record systems in the offices of the assessors. It is these parcel based or cadastral maps which serve as the basis for the GIS and which the Assessor in each County is required to maintain by ORS Statute.

In 1987 the State Department of Revenue acquired a new "state-of-the-art" computer mapping system. In July of that year an agreement was reached between the State of Oregon and Multnomah County in which the State agreed to develop a new set of maps for Multnomah County. These maps are being developed by DOR in conjunction with the State Department of Transportation which has the responsibility for the transportation systems in Oregon. Both of these State agencies acquired similar hardware and software to facilitate the transfer of data between the two computer mapping systems, to prevent unnecessary duplication of data entry and insure the accuracy of the data. Multnomah

County, the City of Portland, and many of the major utilities in the tri-county area have also chosen to use the same computer hardware and software which has become the de facto standard for the State agencies responsible for developing map standards in Oregon.

Last year the Metropolitan Service District decided to develop its own GIS to be used as a planning tool in the tri-county area. The maps which will form the base of their system will be drawn from the parcel based maps which are maintained by the Assessor in each County. We have been working with METRO in their efforts to create a planning data base for the tri-county area. We do not feel that their effort conflicts or duplicates the need for the Assessor to maintain parcel maps or the project currently underway between the State Department of Revenue and Multnomah County. Once the County's maps are complete, these will be made available to METRO who will then add the necessary data which will allow this map base to serve as a tool for urban planners.

Unfortunately, METRO chose a hardware and software platform which requires that they "convert" the parcel based maps before they begin to add the data that is unique to the planning function. They were aware of the additional cost that would be involved when they chose to deviate from the standard which had been adopted by the State and the major counties and cities in Oregon. It now appears that the Oregonian would like the rest of the world to change to the METRO standard. I suggest regional cooperation would have been better served if METRO had chosen to participate as part of the State wide effort in which the other local governments are now participating.

attachment

Share high-tech land data

The electronic age that has revolutionized so many aspects of modern life is ready to turn its computers on the land, the invisible lines that divide it, the streets and highways that run through it, the history of its ownership and the unseen structure beneath it.

With the emergence of geographic information systems, here is one more field where it is imperative that the Portland metropolitan area act as a region. The individual cities, counties and service districts ought not each go its own way in installing expensive technology.

The Metropolitan Service District is developing such a computer operation, calling it the regional land information system. Washington County has signed on as a partner. Others should do the same.

Portland has the makings of its own system, but it is not compatible with Metro's. Therein lies part of the problem of having more than one of these high-tech systems in the region. Not only would there be duplication if each jurisdiction had its own, but also the resulting hodgepodge would not provide regionwide data for all of the various public and private interests concerned about uses and records of the land.

Already known by its acronym, the GIS is a planning tool, but it is more. It is also a surveying instrument, an economic development device, a record-keeper and a mechanism for keeping track of sewer, water and utility lines.

At the punch of a button, it can point a would-be developer to the best locations for a large factory or a small fast-food restaurant. It can give a title company or a real estate brokerage instant knowledge of property ownership. It offers planners ready information on land available in various zones. It gives transportation officials clear guidance on travel patterns.

The initial cost of such a complex computer system is just one reason there should be only one in the region. The main reason the cities, counties and districts should join Metro is that the land data are of regional importance. So the various jurisdictions ought to commit themselves to regional cooperation while the advanced technology still is early in this phase, before any others are tempted to set up their own system.

James Munz
Manager, Information Services Division
Multnomah County
4747 East Burnside Street
Portland, Oregon 97215

THE DEVELOPMENT OF A GEOGRAPHIC INFORMATION SYSTEM IN MULTNOMAH COUNTY

ABSTRACT This paper describes the project being undertaken by Multnomah County with the assistance of the State of Oregon Department of Revenue to improve the quality of the maps which support the Assessment and Taxation function. It also outlines the parallel efforts to link the other land related data to the map base to provide a geographic information system for policy and decision making.

OVERVIEW

The diversity and complexity of today's economic, social, environmental and development problems place a tremendous burden on public officials They are constantly faced with policy decisions that individually or collectively impact not only the expenditure of public funds, but more importantly the health and welfare of entire communities. Public administration is no longer just a matter of political leadership; it has become a science requiring a wide range of management skills.

Probably the most fundamental of all management skills is the effective use of information. Multnomah County developed its first information processing system in 1961; like most organizations the first applications area addressed was the production of the County's payroll. While the County has continued to develop computer applications for over 25 years, and now maintains a portfolio of information systems worth many millions of dollars, the information required by top management for decision making has rarely been available.

In 1982 a number of individuals in the County recognize that, if meaningful management information is to be available, the County will have to develop computer systems with the ability to integrate a variety of data files. It was also recognized that these integrated systems will have to be able to generate versatile reports and graphics based upon the user requirements rather than pre-defined system parameters. Within local governments the most common reference system is geographic location. It has been estimated that 70% to 80% of the information and activities with which a local government is concerned are location related. The project which is now underway is an attempt to apply geographic information

systems (GIS) technology to build an integrated land information system (LIS) as a means of providing data to decision makers for policy and planning purposes.

HISTORY

A survey of the state of our data processing systems and the maps that were in place in 1982 indicated that we had a long way to go if we were to achieve the goal of a management information system that integrated existing information systems with our map data base. The survey pointed out that we had a number of problems to deal with. The County was operating with a set of maps that had been produced in the 1930's and 40's that were badly in need of reconstruction. In addition, the data processing systems which supported the various county agencies existed as a set of independent activities with no standardization or integration. It was also clear that we would need a substantial commitment of resources, both time and money, if we were to correct the situation.

The initial investigation identified a number of problems with the current process that would have to be addressed in the new system:

1. The existing maps are rapidly deteriorating and can no longer be maintained. State law requires that the County Assessor maintain a set of maps that show how property is owned, valued and taxed. (Oregon Revised Statute 308.245 require that the Assessor maintain, "a set of maps upon which are outlined the boundaries of each land parcel subject to separate assessment within the county".) While it was evident that the maps currently in use were badly in need of reconstruction using new survey data, budget reductions during the 1970's had reduced the cartagraphic staff to the point where re-mapping using the old, labor intensive methods, is no longer possible.

2. Map data throughout the County is untimely or poorly maintained. Most of the departments in the County as well as many outside agencies use the tax maps as a base for their particular application. Updates made to the tax maps need to be available in many different departments and divisions throughout the County. This normally requires that each department draft the same updates which are made to the tax maps. In practice, updates to the department map base occur infrequently, if at all, which yields untimely information on which to base decisions. If the update is made, it may not accurately reflect the actual changes made to the original tax map.

3. Lack of data standardization. Most of the data that supports the day-to-day activities of the County resides on the County's mainframe computer. Little or no attempt has been made to standardize this data. As a result, addresses which identify the location of property and

individuals exists in seven different formats in twenty three different applications. This results in the inability to cross reference data collected by other agencies and makes it impossible to integrate mainframe data with the map data base.

4. Data is isolated with little sharing. Not all departments know what data is available from other departments. There is also a fear that information may be mis-used or changed by other departments, or that confidentially prevents data being made available to other departments. This results in the duplication of effort and inefficient use of resources such as additional data storage or redundant data collection.

5. Data is not manageable. The capability to create ad hoc reports or to perform complex analyses does not exist. For the data now stored on the mainframe computer, turnaround time for reports is slow and special programs must be written to perform analyses. Association of geographical data with maps must be performed manually as there is no mapping graphics capability.

NEEDS ASSESSMENT

The project to implement a GIS in Multnomah County began as a cooperative effort between the Division of Assessment and Taxation and the Information Services Division. In December of 1985 we contracted with Portland State University to help us with defining our requirements for a new mapping system. In April of 1986, The Center for Urban Studies at Portland State completed a report which provided us with:

1. a survey of the current usage of the assessor's mapping system.

2. an assessment of the future data needs of the users based upon the implementation of the assessor's plans for computerized cadastral mapping system, or multipurpose cadastre (MPC).

3. identification of the locational accuracy requirements of the proposed mapping system.

4. identified a strategy which allowed for gradual improvement in accuracy of locational data.

We also contracted with Arthur Young Inc. to help us develop a long range plan for applications development and a data model for the County. We had been using data base management systems on the mainframe computer since 1979. The study done by Arthur Young staff showed that many of the County's current computer applications had been in place for many years and needed to be upgraded or replaced. The study also indicated that if we wanted to integrate our

mainframe data with the mapping data base, in a way that would provide management information, we would have to develop standards for data storage and then redevelop many of our existing mainframe applications to meet the new standards.

GIS DEVELOPMENT

The basic conceptual model for GIS in local governments is that of the multipurpose cadastre (National Research Council, 1980; National Research Council, 1983). Several variations of this model exist, but most of these share the same basic concepts and features. The model is based on the parcel as the central entity in the GIS. The ownership parcel, or cadastre, is the entity with which most local government operations and applications are concerned. The components of this model include:

- A spatial reference framework. This framework consists of a network of geodetic control points, and provides the geographic reference for the data in terms of X-Y coordinates.

- A large scale base map. This map or map series provides the base by which the cadastral information is related to the geodetic reference framework and to base map features.

- A cadastral overlay. This component depicts the parcel boundaries, and includes a graphic overlay on the base map.

- Linkage mechanisms. These provide linkage or correspondence between the elements of the cadastral overlay (the parcels) and to other land related data, based on unique parcel indentifiers.

- Land related data. These include the local governments' information concerning land, usually configured as a variety of application specific data sets and other overlays of parcel related data.

EQUIPMENT SELECTION

The evaluation of solutions was a fairly straight forward exercise for a number of reasons. First, there are very few vendors in the industry who are capable of supplying the technology which was required to support the kind of integrated system that was envisioned for Multnomah County. Second, in 1951, the Oregon State Legislature approved a statewide reappraisal program. The purpose was to achieve equalization and uniformity in ad valorem taxation. It was immediately found that the real property inventory in most counties was incomplete and that the cadastral maps were inadequate for appraisal purposes. Furthermore, there was no uniformity between county map systems. Tax administrators realized that

equalization could not be achieved by reappaisal alone; map standards had to be developed and employed in a massive statewide reappraisal program.

In 1952, the State Legislature authorized the State Tax Commission to install and assist in the preparation and maintenance of map standards, cadastral maps, and standard record systems in the offices of the assessors, also providing for the sharing of expenses of the map and records projects. This was the start of a cadastral map program, which has now evolved into the Computer-Assisted Mapping System developed and operated by the Urban-Rural Mapping Unit of the Assessment and Appraisal Division of the Oregon Department of Revenue. The responsibility of the Urban-Rural Mapping Unit include the development and maintenance of the Oregon State cadastral map standards and the preparation and installation of standard cadastral maps and records systems in the offices of the county assessors. The costs of developing these maps is shared by the counties and the State on a 50-50 cost-share basis.

In 1987 the Department of Revenue acquired a new "state-of-the-art" computer mapping system. In July of that year an agreement was signed between the State of Oregon and Multnomah County in which the State agreed to develop a new set of maps for Multnomah County and Multnomah County agreed to pay half the costs.

This narrowed our choice of solutions to systems that would be compatible with the new equipment acquired by the Department of Revenue and, at the same time, be able to share data with the County's mainframe computer. Armed with this information and the requirements that were developed for us by the project team from Portland State University, we began to contact vendors, users of vendors products and independent consultants to determine what was "compatible", and which equipment would best serve the needs of the County.

After an extensive evaluation process the County selected Intergraph Corporation to supply the hardware and software which will store and maintain the map data. This is the same vendor selected by the State of Oregon Department of Revenue, the Department of Transportation and is in use in several local agencies including PGE and the City of Portland. The selection of Intergraph as the vendor allows the maps to be drawn by the Department of Revenue and then transferred to Multnomah County with no conversion of the map data. It also facilitates the sharing of the updated base maps with other public and private agencies in the County.

This selection process was also helped by the County's association with URISA. The Urban and Regional Information Systems Association is an organization of professionals involved in developing and applying local governments GIS, and related issues. Founded in 1962, it is one of the oldest and largest professional organizations dealing with GIS. URISA serves to bridge the gap between users and providers of information for public operational systems and decision making. The membership is composed primarily of administrators and technical staff in municipal, county and regional governments. I had the opportunity to attend their

1989 conference held in August of this year. At the conference it became apparent that there are two vendors who seem to have emerged as the leaders in the development of this new technology: Environmental Systems Research Institute with its ARC/INFO programs and Intergraph Corporation with its TIGRIS system. Both of these vendors are competing for market share in this area, ESRI seems to have focused its attention on the planners who generally require the integration of many layers of data but do not have high accuracy requirements while Intergraph is directing its product toward the land surveyors and engineering types where high degrees of accuracy are required. One of the major announcements of the conference was the introduction of a new version of ESRI's ARC/INFO software that runs on Intergraph's CLIPPER-based systems. This gives Multnomah County the ability to add the ESRI software to our existing hardware platform once our map base is completed and gives us the best of both worlds.

IMPLEMENTATION

Since July of 1987 the mapping project has continued under the direction of Jim Czmowski, the Records Manager at Assessment and Taxation. Working with Irv Iverson of the Department of Revenue, maps covering about 20% of the County are completed. The project has also benefited from the sharing of data between the State Department of Transportation and the Department of Revenue.

Within the last year both the Federal Government and the State of Oregon have begun to recognize the importance of geographic information systems for policy and decision making. At the state level, a State Map Advisory Council was formed with the purpose of defining the State Government's policy, goals, and strategies for managing geographic information systems and the data and information therein. The United States Department of the Interior, Bureau of Land Management is also engaged in a project in Oregon which has the potential for improving the quality of our map base. This project which is a cooperative effort between BLM, Oregon State Office, USGS, National Mapping Division, Oregon Department of Revenue and several Oregon counties is verifying the control points which are used to establish the map base . Many of these control points were established during the period 1850-1870. The re-surveys in the test areas have shown a significant improvement in accuracy over the original surveys. Once the entire State has been re-surveyed, the Department of Revenue will apply the improved control and accuracy to Multnomah County's maps.

In order for the map base to function as part of a geographic information system, the other land related data must be linked to the map base. Most of this data is stored on the County's mainframe computer. At the present time this data resides in several different data bases and is stored in many different formats. This makes it difficult if not impossible to link to the map base.

The major link between the map base and the related land information will be the property address. This will be the "key" that will allow us to locate incidents for law

enforcement agencies, identify clinic populations served for the health clinics, use census data for market analysis, assist elections in redistricting, perform locational analysis, and other land and land use applications. The first set of links will be to the data bases which support the property tax assessment and collection functions. This project, recommended by the Data Processing Management Committee and approved by the Board of County Commissioners last year, will provide the address data base with links to the map file for all the characteristic or attribute data which describes the land parcels and the improvements in the County.

The second set of data bases to be linked will be those which support the criminal justice system. Work is already underway in the Sheriff's Office to integrate the Corrections Population Management System, the Justice Automated Warrant System and Sheriff Records Management System. These systems will be integrated using a common set of data standards that will also simplify the linking of criminal justice incidents to the map data base and census data. Once the work in the Sheriff's Office is in the design phase we will start work on the computerized systems which support the prosecution functions in the criminal justice system.

In all of the work that we have done so far and in all of our planning for the future, we have been careful to coordinate our direction with the other agencies in the local area who use the Assessor's maps. This includes the City of Portland who uses the maps in the Water Bureau and Planning Office. It also includes the local utilities who use the maps for identifying the location and type of service being provided. Over the last year we have also worked closely with METRO. They are in the process of developing a high level planning map base for the tri-county area. METRO's intent is to merge the parcel based maps from Washington, Clackamas and Multnomah counties and to make this available to local governments and private agencies for locational analysis and economic development.

Our association with the State Departments of Revenue and Transportation and through them to the Oregon State Map Advisory Council, ensures that the development of our map base will be consistent with the policy direction on GIS which is being developed at the state level. Recently the Department of the Interior, Bureau of Land Management recognized the need for national standards on the development of land information systems. Here again, the joint projects which are being undertaken between BLM and the State of Oregon will provide us with the information we need to accommodate federal guidelines when they become available. I have attached a copy of the policy adopted by the Oregon State Map Advisory Council for anyone interested in the current direction of GIS in Oregon.

MULTNOMAH COUNTY OREGON

DEPARTMENT OF GENERAL SERVICES
INFORMATION SERVICES DIVISION
4747 EAST BURNSIDE
PORTLAND, OREGON 97215
(503) 248-3749

GLADYS McCOY
COUNTY CHAIR OF THE BOARD

MEMORANDUM

TO: Linda Alexander, Chair
Data Processing Management Committee

FROM: Jim Munz, Chair
Operating Staff

DATE: March 13, 1990

SUBJECT: Funding Strategy for FY 1990-91

The Operating Staff of the Data Processing Management Committee met on Monday, February 26, 1990, to consider the following issues: 1) a funding strategy for FY 1990-91, 2) the "strategic issues" which had been referred to the DPMC by the PDC, 3) to finalize the Information Systems Development Plan for FY 1990-91 and, 4) to finalize the proposed changes to Ordinance 511 which established the Data Processing Management Committee.

The Operating Staff recommends the following funding strategy for FY 1990-91:

The identified continuing projects should be funded at the level indicated:

Assessment and Taxation	$280,000
Facilities Management	30,000
District Attorney	482,000
Sheriffs Office Integration	207,000

The remaining money should be allocated as follows:

~~Integrated Financial Management~~		~~160,000~~
Unallocated Reserve	$81,000	~~21,000~~

with the following caveat. Prior to the beginning of next fiscal year, the work in progress in the District Attorney's Office and the work in the Juvenile Division should be reviewed by the DPMC. Both of these projects should have finished their requirements definition phase by that time. If it appears that the District Attorney's project will not need the amount identified for next year and/or the Juvenile requirements definition has identified a solution which can be implemented with available funds, the DPMC should reevaluate the recommended funding strategy.

With regard to the other items on the agenda:

- the consensus of the operating staff is that the strategic issues had been addressed through the Long Range Plan and the normal budget process. The placement of the purchasing system replacement as a high priority project addressed the need for integrated financial management; while PC support was important, a significant number of mainframe system support issues should come first, and the GIS issue should be dealt with overtime as systems were re-engineered or replaced.

- the Juvenile Division system opportunity was rewritten for inclusion in the plan

- the Sheriff's Office drafted a paragraph for the ordinance which provides management review of telecommunications decisions by the DPMC. This was reviewed by the operating staff and will be included in the next draft of the ordinance.

If there are questions or if you need clarification about the recommendations of the Operating Staff please let me know.

37ADMIN

cc: Kelly Bacon
David Bogucki
Bob Mabry
Barbara Simon
Betsy Williams
Sherrill Whittemore

MULTNOMAH COUNTY OREGON

INFORMATION SYSTEMS DEVELOPMENT PLAN FY 1990-91

FEBRUARY 1, 1990

ISD SISP JW FEB 87 REV JB JAN 90

TABLE OF CONTENTS

PREFACE

This document is the annual update of the Strategic Information Systems Plan for Information Systems Development. The Plan documented in this report will provide the basis for meeting Multnomah County's long-range information system needs. This report is organized into four sections.

I. Description of the Methodology

II. Senior Management Interview Findings
   A. Mission Statement
   B. Strategic Planning Process

III. Long Range Plan

IV. Portfolio of Potential Information Systems

INTRODUCTION

Multnomah County Ordinance 511 directs the Data Processing Management Committee to submit to the Board of Commissioners an updated Data Processing Plan each year.

In 1985, the Data Processing Management Committee adopted a Methodology for developing this plan called Strategic Informations Systems Planning. The Strategic Information System Plan (SISP) which results is based on an assessment of the critical information needed to support the mission of Multnomah County. The Plan documents the necessary information systems, resources, projects schedules, and budgets based on the County's business goals.

The task of developing the Plan was delegated to the Operating Staff of the Data Processing Management Committee. This Committee is composed of County management staff and a representative from the Information Services Division.

OPERATING STAFF

Kelly Bacon
David Bogucki
Bob Mabry
Barbara Simon
Jim Munz
Betsy Williams
Sherrill Whittemore

The work of the Staff was divided into two phases. Phase I focused on surveying existing computer applications and interviewing operational managers to identify potential information systems needs. Phase II developed a methodology for prioritizing the potential information needs and strategic and tactical Information Systems Plans.

The results of that effort are presented in Section III.

DRAFT

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR THE MULTNOMAH COUNTY, OREGON
ORDINANCE NO. 511

An ordinance establishing committees to assist in data processing and telecommunications planning, funding and project management.

Multnomah County ordains as follows:

SECTION I. FINDINGS

A. The Board finds that a need exists for ongoing planning and management in the area of data processing and telecommunications.

B. There is a need to clearly define the goals and objectives of data processing and telecommunications planning and funding.

C. Committees should be established to provide for the organization and management of data processing and telecommunications planning, funding and project management.

SECTION II. ESTABLISHMENT OF MANAGEMENT AND TELECOMMUNICATIONS COMMITTEE

There is hereby established a Data Processing Management Committee, which shall function as described below.

A. The purpose of the Management Committee shall be to:

1. Act as the policy setting body for all County data processing.

a) Authorize, monitor, and annually approve a Data Processing Plan.

b) Authorize funding levels for new systems development and establish a funding mechanism necessary to finance the development of those applications set forth in the Plan.

c) Review and approve data processing service objectives, and the Capital Replacement Plan.

2. Provide management control for all County data processing.

a) Review and approve the County annual budget request for all data processing needs.

b) Review and approve requests for data processing support and determine the method by which projects will be monitored.

3. Monitor all County data processing activity.

a) Review quarterly DP spending for compliance with the budget.

b) Review progress on major projects for schedule and budget compliance.

4. Provide management review for all County telecommunications.

a) Review the County annual telecommunications needs and budget.

b) Review telecommunications projects.

B. Membership: The membership of the Management Committee shall consist of each County Department Head, the Sheriff, the District Attorney, and a private sector business executive appointed in accordance with charter provisions who shall be appointed for a two-year term.

C. Organization and Support: The chairperson shall be chosen by committee members for a term that is mutually acceptable to all members. The Management Committee shall meet monthly the first year and no less than quarterly thereafter. The Director of Information Services shall be responsible to staff the committee.

SECTION III. ESTABLISHMENT OF USER STEERING COMMITTEE

There is hereby established a Data Processing User Steering Committee for each County department, which shall function as described below:

A. Purpose: For each department, a User Steering Committee is established to:

1. Identify and define new systems opportunities and monitor the progress of ongoing systems development efforts within the Department.

2. Develop a long-term data processing development plan for the Department which will subsequently be incorporated into the Data Processing Plan for the County.

3. Assume responsibilities for the specifications of DP systems and the justification for such systems as may be required for planning, budgeting, or other purposes.

B. Membership: Members shall be user representatives from each functional organization affected by data processing systems. Each Department Head shall appoint the members to serve on the Steering Committee for his/her department. The Sheriff and the District Attorney shall appoint members from their respective organizations to serve on the Justice Services User Steering Committee.

SECTION IV. ANNUAL REPORTS

The Management Committee shall submit to the Board of County Commissioners as updated Data Processing Plan as set forth in Section I above, no later than February 15 [November 30] of each year.

ADOPTED this _____ day of _____, 19___, being the date of its second reading before the Board of County Commissioners of Multnomah County, Oregon.

(SEAL)

BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

By _____
Gladys McCoy
Multnomah County Chair

REVIEWED:

LARRY KRESSEL, COUNTY COUNSEL
FOR MULTNOMAH COUNTY, OREGON

By _____
Deputy County Counsel

0691A/2172A/JM:jl

I. METHODOLOGY

This Plan identifies the Information Systems Projects that should be accomplished in order to support the current and future business needs of Multnomah County. As part of that project, a planning process was put in place which provides for annual update to the plan in order to align the plan with management's priorities. The Methodology which is used to maintain the Strategic Information System Plan is described below.

BENEFITS OF INFORMATION SYSTEMS PLANNING

Implementing effective information systems in today's sophisticated hardware and software environment is inherently a complex activity. The need to integrate information maintained by individual application processes further complicates the task. Truly useful systems cannot be developed in a timely manner and at reasonable costs without careful and deliberate planning. At a minimum, a good Information Systems Plan that is kept up to date will:

- Improve communications between executive management, the information systems managers, and users. The Plan provides a common basis for understanding and measuring the contribution of the information systems function.

- Identify and provide a sound basis for allocating scarce resources to the information systems function.

- Identify priority projects that help to achieve the organization's most critical goals and objectives and satisfy its most important information requirements.

- Consider the impact that current and future technological developments are likely to have on the organization's data processing environment.

- Provide tools that will enable management to monitor progress against the plan, and update the plan in a systematic manner.

- Coordinate the various elements of the information systems function--data processing, communications, office systems, and end-user computing.

OVERALL APPROACH TO STRATEGIC INFORMATION SYSTEMS PLANNING

The SISP Methodology used to develop this document is based on a simple concept: Information systems can and should be planned and managed to support the strategic direction of the organization. In practice, this concept puts control of information systems planning and implementation where it belongs--in the hands of management.

In essence, the planning work is divided into two parts. In the first part, information requirements are defined by stepping downward in a hierarchical fashion. Overall, organizational goals are defined and validated against departmental goals. Next, the objectives of the organization are defined. The primary functions of management are planning, organizing, communicating, and evaluating. The ability to carry out these managment functions effectively is dependent upon a clear statement of objectives, understanding of interrelations among objectives, establishing a good match between objectives and the resources with which to implement them, and setting priorities on objectives based on consideration of their relative merit and the constraints acting on the organization. In the absence of a written set of objectives, the project team relied on interviews with top management and input from the Data Processing Management Committee to identify objectives and establish priorities. This information was then used to formulate a general philosophy to guide them in identifying the value system of the organization.

The information systems planners then define the business functions (and specific processes and activities performed in conjunction therewith) which

are directed at positively impacting the work of the County. Each of these activities, in turn, use and/or produce information needed to support that activity effectively. Thus, information requirements are not defined by guess work or supposition--they are systematically derived through a thorough understanding of how and by whom the information will be used and, more importantly, for what purposes. This is the essence of the "top-down" planning.

The next step is to examine the existing information systems to identify the extent to which they provide a foundation for further system development or redevelopment efforts. This activity will determine not only the nature and services of existing data, but also how well the existing information systems environment supports the business functions defined earlier.

Based on the foregoing activities, the planning team identifies basic classes or logical groupings of data used by the organization. Data classes are defined for each business function and its various support activities. Data classes represent types of information related by a single purpose. They can consist of one or a collection of data attributes.

The next step is to construct the data model by aggregating data classes into related groups based on expected usage. The data model also illustrates the various inter-relationships among the organization's data classes. It shows, in the clearest possible way, what data is necessary to support the organization's generic operating function and how it should be arranged for maximum efficiency and utility.

BOTTOM-UP DEFINITION

The next group of activities are also performed in hierarchical fashion. In comparison to the planning phase, however, it is performed in the opposite direction, i.e., from the "bottom up." Stated another way, the planning first proceeds from the general to the specific, while the subsequent detailed activities proceed from the specific to the general.

The data model becomes the basis for system definition and is used from the "bottom up" to determine future requirements. The model is segmented into subject areas (data bases) and compared to the current system profile. Needs versus capability assessments are performed to produce recommendations for specific categories, projects, and system configurations. These recommendations will cover topics such as applications development versus purchase, new technology assessments, and software tools for in-house development.

Next, the potential Information Systems Plan is defined. This plan is a conceptualization of the systems which will be required to support the organization's operating functions and, in turn, its Critical Success Factors and goals. In addition, it depicts the data classes that have to move among the various systems it encompasses. The plan represents an "ideal" data support system. It provides a benchmark for determining what will be required to migrate from the organization's present position to the future systems environment. Depending upon cost/benefit considerations, that environment may represent a subset of the ideal.

The remaining steps of the SISP process produce the actual information systems development plans. This involves the following types of activities:

- Describing and prioritizing the applications that can be developed (or acquired) over the planning period, assuming alternate resource levels.

- Estimating the EDP resource requirements (with their corresponding costs) that need to be available to develop, maintain, support, and operate the designated computer applications.

- Defining an approach and schedule for applying the resources to develop and operate the designated computer applications.

The plan that results identifies the major projects to be undertaken during the next three-to-five years.

II. SURVEY OF EXISTING APPLICATIONS AND SENIOR MANAGEMENT INTERVIEWS

The survey and interviews are conducted for two purposes: first to identify how well the information needs necessary for managers to make informed decisions about the operational activities of the County are being satisfied. These information needs provide input to the process of identifying potential information system projects. The second purpose of management interviews is to discover the assumptions upon which the organization is based. It is through these assumptions that the underlying value system of the organization is identified and a criteria for evaluating or ranking the potential information system projects can be developed.

The County has recently initiated a strategic planning process whose purpose is to become the vehicle for systematic long-range planning. The goal of this process is to provide the County with the ability to plan and manage for the future. It is anticipated that this will allow comparison of difficult program activities, priority setting that cuts across organizational lines, and much greater emphasis on productivity and efficiency in all operational areas. This process is in its initial phases and is not available for use as a tool for prioritizing potential information systems opportunities.

The first task of the project team was to review the criteria for ranking or ordering the potential information system projects. The list was refined and then presented to the Data Processing Management Committee for review. The criteria on the following page is the output of this process.

CRITERIA FOR RANKING
POTENTIAL INFORMATION SYSTEMS OPPORTUNITIES

The criteria below recognizes that there are a significant number of potential information system development projects, each of which has the ability of making a contribution to the mission of the County. The criteria provides a mechanism for identifying the order in which potential projects should be evaluated for possible funding by the Data Processing Management Committee. It is assumed that before any project is recommended for funding, a complete feasibility study would be done. In future years, the criteria will take account of the strategic plan for the County which is currently being developed.

C1. SUPPORTS MANDATED SERVICES OR LEGAL REQUIREMENT — 5 POINTS

Potential information systems projects which support mandated services receive points in this category. For purposes of this criteria, mandated services include those required by US Code and CFR, Oregon Revised Statutes, The County Charter, Multnomah County Code, and Ordinances established by the Board of County Commissioners.

C2. PUBLIC SAFETY NEED — 4 POINTS

Potential information systems that directly affect public safety needs receive points in this category.

C3. REVENUE GENERATION — 3 POINTS

Potential information systems which would increase revenue received or decrease the cost of obtaining the same revenue receive points in this category.

C4. CONTROL EXPOSURE TO LIABILITY OR RISK — 3 POINTS

Potential information systems which support services where the County is currently at demonstrable risk and will reduce County liability receive points in this category.

C5. MULTIPLE AGENCY APPLICATION — 3 POINTS

Potential information systems that have the characteristic that they will provide service to County agencies receive points in this category. For purposes of this criteria, multiple agency application includes information systems which can be transferred from one agency to another or which will be used by multiple agencies at the same time.

C6. IMPROVE COUNTYWIDE MANAGEMENT — 1 POINT

Potential information systems which improve the quantity or quality of information available to managers Countywide receive points in this category.

C7. DEPARTMENT OR AGENCY PRIORITY — 15 POINTS

Each department or agency has an additional 5 points which may allocate to a single system opportunity or may be distributed among several opportunities.

III. LONG-RANGE PLAN

This plan provides a road map. It identifies potential information systems applications and suggests an order in which they could be evaluated for potential contribution to or support of County goals and critical success factors. This Information Systems Plan is intended to be a dynamic plan; one that can be revised and updated as future needs dictate. It is also a plan that can only be accomplished through a reasonable commitment of resources and support of top management.

PROJECT		TIME (WEEKS)	RISK (0-100)	POINTS	COST
DGS	PURCHASING	6	28	27	$159,701
DHS	JUVENILE JUSTICE/ICJIS	N/A	53.9	27	$ 80,000
DA	CHILD SUPPORT ENFORCEMENT	30	63.7	26	$ 97,854
DES	CEMETERIES	26	23.4	23	$ 69,695
DES	EMERGENCY MANAGEMENT	30	32.6	12	$ 95,248
DA	JUVENILE	52	34.7	9	$ 82,720
DES	COST ACCOUNTING	12	23.2	9	$ 76,000
DES	PARK RESERVATIONS	26	23.4	8	$ 69,695
DES	PARK REVENUE	25	35.6	8	$ 63,975
DHS	SOCIAL SERVICES	30	33.7	8	$132,056

PROJECT		CR5	CR4	CR3	CR3	CR3	CR1	CR15	TOTAL
DA	CHILD SUPPORT ENFORCEMENT	5	0	3	0	3	0	15	26
DA	JUVENILE	5	4	0	0	0	0	0	9
DES	CEMETERIES	5	0	3	0	0	0	15	23
DES	COST ACCOUNTING	5	0	0	0	3	1	0	9
DES	EMERGENCY MANAGEMENT	5	4	0	3	0	0	0	12
DES	PARK RESERVATIONS	5	0	3	0	0	0	0	8
DES	PARK REVENUE	5	0	3	0	0	0	0	8
DGS	PURCHASING	5	0	0	3	3	1	15	27
DHS	JUVENILE JUSTICE/ICJIS	5	4	0	0	3	0	15	27
DHS	SOCIAL SERVICES	5	0	0	3	0	0	0	8

PROJECT		CR5	CR4	CR3	CR3	CR3	CR1	CR15	TOTAL
DGS	PURCHASING	5	0	0	3	3	1	15	27
DHS	JUVENILE JUSTICE/ICJIS	5	4	0	0	3	0	15	27
DA	CHILD SUPPORT ENFORCEMENT	5	0	3	0	3	0	15	26
DES	CEMETERIES	5	0	0	0	3	1	15	23
DES	EMERGENCY MANAGEMENT	5	4	0	3	0	0	0	12
DA	JUVENILE	5	4	0	0	0	0	0	9
DES	COST ACCOUNTING	5	0	0	0	3	1	0	9
DES	PARK RESERVATIONS	5	0	3	0	0	0	0	8
DES	PARK REVENUE	5	0	3	0	0	0	0	8
DHS	SOCIAL SERVICES	5	0	0	3	0	0	0	8

IV. PORTFOLIO OF POTENTIAL INFORMATION SYSTEMS

This section describes the major applications systems that were proposed. They are in alphabetical order by department and within a department in the order in which they were presented to the Operating Staff.

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
SUPPORT ENFORCEMENT

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
SUPPORT ENFORCEMENT

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Support Enforcement Division is a division of the District Attorney's Family Justice Division and is responsible for representing the State in child and spousal support matters.

The services provided include the establishment and enforcement of essentially five different types of support cases:

Existing Oregon Orders
Establishment of paternity cases
Establishment of new support order cases
Initiating reciprocal petitions
Responding reciprocal petitions

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

1. The current records system consists of a manual index card file. This is a rather antiquated, inefficient and labor-intensive system.

2. Case information on obligators and obligatees is difficult to maintain, track and retrieve.

3. They do have a dedicated stand-alone word processing system for document production; however, this does not allow for any case tracking, payment history, calendar generation, management reports or statistics.

4. The existing State Support Enforcement System (SES) serves the needs of the State IV-D office; however, case management functions that occur primarily in the District Attorney's offices are only minimally met by this system. The problems that exist for the Support Enforcement Division of the District Attorney's office include:

The system is very restrictive in the amount of free text that is allowed.

The system does not produce daily and weekly calendars of appointments and hearings for each of the attorneys.

The system is very limited in form production.

The system does not support the downloading of data for ad hoc reporting and analysis.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Proposed is a computer-based system that would allow for case tracking, payment history and schedules, calculate arrearages, generate form documents, calendars, produce statistics and management reports, and have word processing capabilities from the data base.

The use of computer technology to create data base, coupled with a word processing application, would substantially improve the speed, accuracy and completeness of the information provided to the staff and management of the Support Enforcement Division.

A computerized data base stand-alone system that interfaces with the existing State system that has the ability for:

- On-line case initiation and checklists
- Cross reference and conflict case information
- On-line update of case history and status
- Individual calendaring and docketing
- On-line history of past case events and their dispositions
- Activity reports detailing case-related actions by case worker and attorney
- Produce management and statistical reports
- System-produced docket sheets for all cases

- Generate forms and notices
- A computer software package to allow for arrearage calculations and document production
- Word processing capabilities utilizing database information downloaded from the State Support Enforcement System (SES)
- System interface with other city, county and state systems

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

This application will contribute significantly to the District Attorney providing his mandated services. State law requires that a register of all suits, actions and proceedings commenced within their jurisdiction be maintained. In addition, the District Attorney is to give priority to the cases relating to public assistance and reciprocal enforcement of support (see ORS 8.700, 8.675 and Chapters 25, 107, 109, 110, 163 and 416).

There is an intergovernmental agreement between the District Attorney and Adult and Family Services for child support that requires regular reporting of case loads and status.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

The current information collection, data flows and retrieval duties could be performed more effectively with an automated records and data tracking system. There would be substantial improvement in the speed, accuracy and completeness of information provided to lawyers, management and staff of the Support Enforcement Division. An automated data tracking and word processing system would assist management in planning case loads, preparing weekly, monthly and annual reports, and plan for better use of existing personnel. The increased productivity would allow for better service to the citizens of Multnomah County.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
SUPPORT ENFORCEMENT

The federal government currently has a program that will reimburse local jurisdictions 68 cents for each $1 that is spend on the development and implementation of a records system for support enforcement. In addition, the federal program includes an incentive promotion which provides additional funds to jurisdictions which exhibit a high level of efficiency and effectiveness.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

This information would be of value to probation/parole officers to see if their clients are meeting their reponsiblilities.

The office is centrally located, but the information would need to be available at remote locations to facilitate data sharing.

PACKAGE AVAILABILITY: ISD

Research has indicated that generally known packages do not exist for this application.

IMPACT ON ISD RESOURCES: ISD

The size of this application does not indicate that it will have a significant impact on ISD resources.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
SUPPORT ENFORCEMENT

ESTIMATED BENEFITS

COST DISPLACEMENT	$	0
STAFF	$	0
COST AVOIDANCE	$	0
VALUE ADDED	$	0
DEVELOPMENT TIME (in weeks)		30
RISK SCORE		63.7

PROJECT DEVELOPMENT COSTS

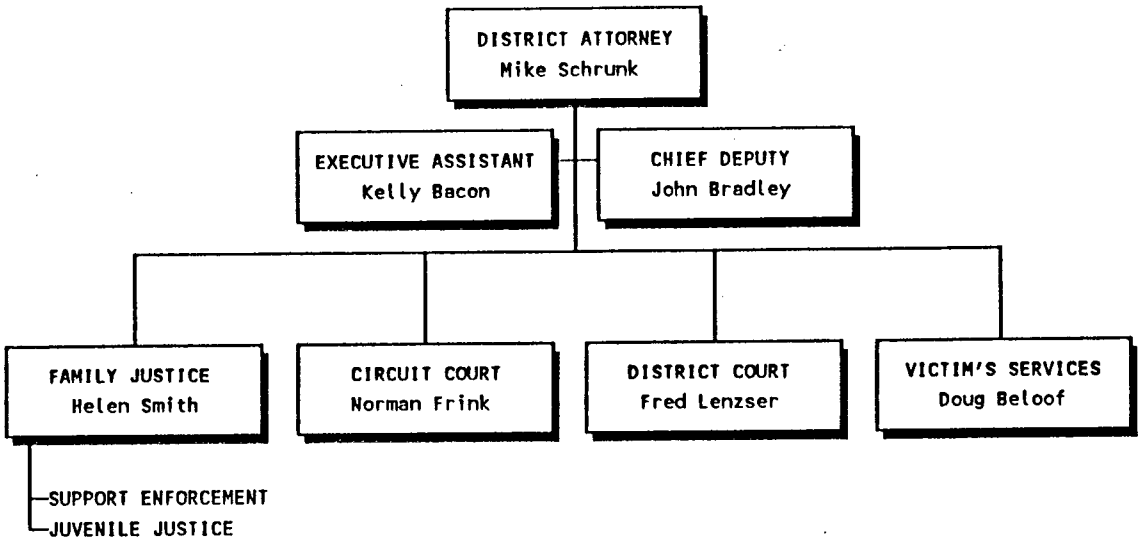
STAFF	$87,854.00
MATERIALS/SERVICES	$ 0
CAPITAL	$10,000.00
TOTAL	$97,854.00

OPERATIONAL COSTS

STAFF	$ 0
MATERIALS/SERVICES	$ 6,000.00
CAPITAL	$ 0
TOTAL	$ 6,000.00

COMMENTS

The requirement that the system interface directly with the State of Oregon system results in a higher risk score than normal.


DISTRICT ATTORNEY
Mike Schrunk
EXECUTIVE ASSISTANT
Kelly Bacon
CHIEF DEPUTY
John Bradley
FAMILY JUSTICE
Helen Smith
CIRCUIT COURT
Norman Frink
DISTRICT COURT
Fred Lenzser
VICTIM'S SERVICES
Doug Beloof
SUPPORT ENFORCEMENT
JUVENILE JUSTICE

RISK ANALYSIS DOCUMENT

System Name: Support Enforcement

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	10	15
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	10	10
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	5	7
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	4	8
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	5	5
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	3	2.1
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	4	4

0 -------- 50 -------- 100
LOW RISK HIGH RISK

RISK ASSESSMENT 63.7

12-05-89 | District Attorney Support Enforcement System | 1/1

ACTIVITY	Planned cost	Planned duration
DA Support Enforcement	$87854	169ed
Feasibility Study	$3114	13ed
Describe Current System	$336	1d
Define Alternative Solutions	$336	1d
Define Recommended Solution	$1053	3d
Develop Requirements Phase Plan	$336	1d
Perform Phase End Tasks	$1053	3d

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
JUVENILE

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
JUVENILE SYSTEM

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The District Attorney's Juvenile Justice department is responsible for:

1. Prosecution on juvenile delinquency cases
2. Representing the state in child dependancy cases
3. Termination of parental rights cases
4. Assisting the court, juvenile department and Children's Services Division (CSD) in matters related to juveniles

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

Creation of an automated case tracking and document production system for the District Attorney's Juvenile Section.

PROBLEMS:

1. The current information collection, flow and retrieval system in the Juvenile Department is antiquated and cumbersome.
2. The manual index card file is inefficient and labor intensive.
3. Case information on juvenile offenders and dependency cases is difficult to maintain, track and retrieve. The data is often inaccurate and incomplete and the work is repetitive and slow.
4. The capability for data retrieval is manual.
5. There is no word processing or document production capabilities. Document generation is limited to a typewriter with very limited storage capacity.

6. There is duplication of clerical tasks in the preparation of Juvenile petitions, subpoenas, orders and calendars. Each must be generated over and over as needed.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

It is proposed that a computer-based data tracking and word processing system be designed and implemented. A word processing system would allow clerks to create standard documents in which names, dates and other information can be replaced by a global command. This and other features will cut substantially the time devoted to document production. The system must be compatible with other existing systems such as OJIN, TJIS and whatever the PROMIS replacement system may be. The system must track offender and incident data.

The use of computer technology to create a client data base, coupled with a word processing application, would substantially improve speed, accuracy and completeness of the information provided to the staff and management of the District Attorney's Office.

Currently there is no output from the manual card filing system. The creation of a data base with word processing application would make possible the generation of such documents as: Juvenile petitions, subpoenas, calendars, letters, court orders, statistics and management reports. Clearly, there is an opportunity to use computer technology in conjunction with streamlined filing systems and better office equipment to meet the needs of the District Attorney's staff.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

This application will contribute significantly to the District Attorney providing his mandated services. State law requires the District Attorney to keep a register of all actions, suits and proceedings commenced in Multnomah County. The District Attorney must also be present at juvenile court proceedings in his jurisdiction. (See ORS 8.700 and 8.685.)

There is currently a contract between the District Attorney and Children's Services Division that requires monthly reporting on dependency cases.

Pending the development of a county strategic plan, this application would make feasible any integration with the state courts or other criminal justice agencies.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

The current information collection, data flows and retrieval duties could be performed more effectively if a computer data base with a word processing application were made available to the Juvenile Department staff. There would be substantial improvement in the speed, accuracy and completeness of information provided to the lawyers, management and staff within this section. An automated data tracking and word processing system would assist management in planning case loads, preparing weekly, monthly and annual report and plan better use of existing personnel.

There are three clerical functions which perform different juvenile prosecution functions but duplicate many tasks. This has caused a system of clerical procedures and processes which are different from one another for no real reason. Automation would eliminate this duplication of data and allow for better management of the clerical staff.

POTENTIAL BENEFITS:

1. Greatly improved ability to retrieve case file information.
2. Improve the ability to compile statistics for use as a planning and budgetary tool.
3. Ability to track cases by status and other indicators.
4. Improved control over physical files.
5. Greatly improved document production.
6. More effective use of manpower.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

None available.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
JUVENILE SYSTEM

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

This information would be of value to Multnomah County Juvenile personnel.

The office is centrally located, but the information would need to be available at remote locations to facilitate juvenile data sharing at their field offices.

PACKAGE AVAILABILITY: ISD

Research has indicated that generally known packages do not exist for this application.

IMPACT ON ISD RESOURCES: ISD

The size of this application does not indicate that it will have a significant impact on ISD resources.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT	$ 0
STAFF	$ 0
COST AVOIDANCE	$ 0
VALUE ADDED	$ 0
DEVELOPMENT TIME (in weeks)	52
RISK SCORE	34.7

PROJECT DEVELOPMENT COSTS

STAFF	$72,720.00
MATERIALS/SERVICES	$ 0
CAPITAL	$10,000.00
TOTAL	$82,720.00

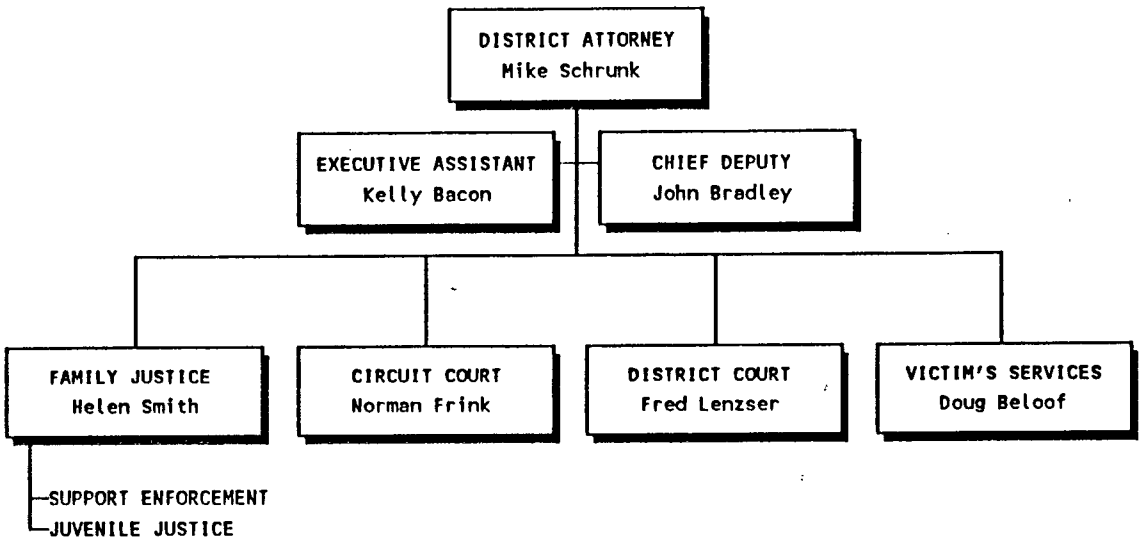
OPERATIONAL COSTS

STAFF	$ 0
MATERIALS/SERVICES	$ 6,500.00
CAPITAL	$ 0
TOTAL	$ 6,500.00

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DISTRICT ATTORNEY
JUVENILE SYSTEM

COMMENTS

This does not include a word processing application. There are software packages available that currently combine data recording with a word processing application. The cost of the software is $30,000. The additional cost of operating on the County mainframe is unknown. The time involved is not known at this time.


DISTRICT ATTORNEY
Mike Schrunk
EXECUTIVE ASSISTANT
Kelly Bacon
CHIEF DEPUTY
John Bradley
FAMILY JUSTICE
Helen Smith
CIRCUIT COURT
Norman Frink
DISTRICT COURT
Fred Lenzser
VICTIM'S SERVICES
Doug Beloof
SUPPORT ENFORCEMENT
JUVENILE JUSTICE

RISK ANALYSIS DOCUMENT

System Name: Juvenile System

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	5	7
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	4	8
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	5	5
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	3	2.1
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	0	0

0 -------- 50 -------- 100
LOW RISK HIGH RISK

RISK ASSESSMENT 34.7

ACTIVITY	Planned cost	Planned duration
DA Juvenile Unit System	$72720	136ed
Feasibility Study	$3114	13ed
Describe Current System	$336	1d
Define Alternative Solutions	$336	1d
Define Recommended Solution	$1053	3d
Develop Requirements Phase Plan	$336	1d
Perform Phase End Tasks	$1053	3d

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF ENVIRONMENTAL SERVICES
CEMETERIES

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
CEMETERIES

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Park Service Division of the Department of Environmental Services employs 20.5 FTEs and has an 1989-90 budget of $2,605,517. The division operates and maintains the County's regional park facilities, which offer a wide range of recreational activities for metropolitan area residents, and historic cemeteries. Sections within the division are: Administration, Cemeteries, Marine Facilities, Blue Lake Park, Oxbow Park, Park Development, and Recreational Facilities.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

Currently all interment and cemetery records are kept manually. This requires in inefficient information retrieval for public inquiries concerning persons buried in the County cemeteries; it is difficult to maintain which interment sites are available for purchase; vital public records are at risk by having them stored in only one media; family genealogy to facilitate future burials is currently very time consuming; and fiscal reporting and contracting is cumbersome.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Capture interment and cemetery information to track genealogy of persons buried in County cemeteries, maintain an inventory of available interment locations, record sales contracts and payments, and provide notices and reports.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

Cemetery services to the public will be more efficient and effective and fiscal reporting and contracting will be improved greatly.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
CEMETERIES

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

Division staff will be better utilized in responding to public queries concerning family genealogy and potential purchases of interment sites. Vital records will be protected by automated archival procedures.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

Unknown.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

The benefits of data sharing for information in this system are low and system compatibility is not a major factor. The need for remote access is not required.

PACKAGE AVAILABILITY: ISD

A search of our resources indicate a lack of commercially or public systems that address the problem. It is unknown whether a qualified system would be available from another local government.

IMPACT ON ISD RESOURCES: ISD

From the information given so far, it is assumed that this project would be a small one and have minimal impact on ISD resources.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
CEMETERIES

ESTIMATED BENEFITS

COST DISPLACEMENT	$	0
STAFF	$	0
COST AVOIDANCE	$	0
VALUE ADDED	$	0
DEVELOPMENT TIME (in weeks)		26
RISK SCORE		23.4

PROJECT DEVELOPMENT COSTS

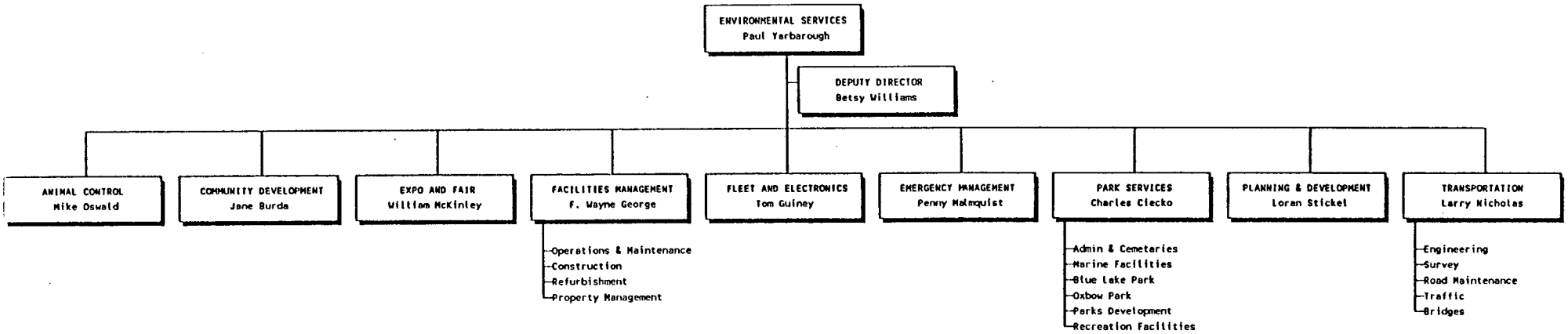
STAFF	$57,906.00
MATERIALS/SERVICES	$10,000.00
CAPITAL	$ 1,788.05[1]
TOTAL	$69,694.05

OPERATIONAL COSTS

STAFF	$ 0
MATERIALS/SERVICES	$ 6,000
CAPITAL	$ 0
TOTAL	$ 6,000

COMMENTS

[1] Equipment costs for two terminals and one printer.


ENVIRONMENTAL SERVICES
Paul Yarbarough
DEPUTY DIRECTOR
Betsy Williams
ANIMAL CONTROL
Mike Oswald
COMMUNITY DEVELOPMENT
Jane Burda
EXPO AND FAIR
William McKinley
FACILITIES MANAGEMENT
F. Wayne George
Operations & Maintenance
Construction
Refurbishment
Property Management
FLEET AND ELECTRONICS
Tom Guiney
EMERGENCY MANAGEMENT
Penny Malmquist
PARK SERVICES
Charles Ciecko
Admin & Cemeteries
Marine Facilities
Blue Lake Park
Oxbow Park
Parks Development
Recreation Facilities
PLANNING & DEVELOPMENT
Loran Stickel
TRANSPORTATION
Larry Nicholas
Engineering
Survey
Road Maintenance
Traffic
Bridges

RISK ANALYSIS DOCUMENT

System Name: Cemeteries

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	2	2.8
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	2	4
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	0	0
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	0	0
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	4	4

0 -------- 50 -------- 100 RISK ASSESSMENT 23.4

LOW RISK HIGH RISK

12-05-89

Department of Environmental Services
Cemetery System

1/1

ACTIVITY	Planned cost	Planned duration
Cemeteries	$52636	129ed
Feasibility Study	$1080	12ed
Describe Current System	$135	1d
Define Alternative Solutions	$135	1d
Define Recommended Solution	$405	3d
Develop Requirements Phase Plan	$135	1d
Perform Phase End Tasks	$270	2d

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF ENVIRONMENTAL SERVICES
COST ACCOUNTING

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
COST ACCOUNTING
DES ADMINISTRATION

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The system will be operated by the accounting unit of the Department of Environmental Services Administration Division. DES Accounting provides financial management and other accounting services to the department's operating units. The system will be utilized by the Transportation and Parks Services Divisions.

Transportation Division, which consists of 167 FTEs and budgeted expenditures of $29,783,985 for 1990, is responsible for the planning, development and maintenance of the County's transportation system. Transportation includes Engineering, Survey, Road Maintenance, Traffic Aids, Urban Services, Bike Paths, and Willamette River Bridges sections. The 1990 budget includes thirty-eight (38) capital projects totalling $9,687,068.

Parks Services Division employs 20.5 FTEs and has a 1990 budget of $2,605,517. The Division provides the County's regional park facilities which offer a wide range of recreational activities for Metropolitan area residents and maintenance of County historic cemeteries. Sections include Admin. and Cemeteries, Marine Facilities, Blue Lake Park, Oxbow Park, Park Development and Recreational Facilities.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

The DES Cost Accounting System was implemented in 1982 to manage and account for construction projects and maintenance functions. The system consists of 56 production programs, which include hardcoded organization structure and work codes, making needed changes difficult and resulting in 20-25% down time in two of the last four years. Other needed changes can't be made, resulting in dissatisfaction of managers and duplication of effort by high-cost users on personal computers. Payroll and expenditure data entered in other County systems must be re-entered and then reconciled to assure accuracy, which is time consuming. LGFS doesn't meet these needs, as it does not include equipment usage or production statistics and can't accumulate costs on multi-year projects.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
COST ACCOUNTING
DES ADMINISTRATION

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

A cost accounting package should be purchased that would facilitate project management, cost measurement, performance measurement and billing of reimbursable costs. This system would:

- o Account for multi-year capital projects in accordance with State of Oregon Executive Department cost accounting guidelines.
- o Track annual maintenance costs, including labor, materials and equipment costs.
- o Accumulate statistics for production analysis.
- o Accumulate data for billings.
- o Integrate input with Payroll and LGFS systems to eliminate duplicate data entry.
- o Provide organizational tables to facilitate changes.
- o Provide user accessible report writer to facilitate information access and utilization by users.
- o Include well documented programs and vendor support to facilitate ISD's operation and maintenance of the system.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

Cost accounting for County road work is required under ORS 368.051. Cost accounting complements the mission of the County by providing a tool to help measure service delivery and cost effectiveness. Correction of the problems in the current system would improve cost effectiveness, service delivery, employee efficiency and employee satisfaction.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

Annual cost displacement would include programming table changes (ISD) $5000 and duplicate data entry (contract and staff time) $10,000. Annual

value added benefits would result from elimination of delays in report output, allowing improved management of construction projects, evaluation of employee performance and billing of reimbursable costs altogether, say 1/2% of Transportation budget, or $150,000. Value-added benefits would result from the ability to change reports.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

As road construction would benefit from a system obtained to account for road work, it is conceivable that some Road Fund resources could be utilized. However, no funds are currently budgeted.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

This system needs an interface to the County's general ledger and payroll system. Due to its wide application to several department, there is also a need to distribute the access to this system across remote locations.

PACKAGE AVAILABILITY: ISD

While cost accounting systems are not widely available in mainframe configurations, at least one company (AMS) offers a package which is installed in Vancouver, B.C., and is currently being installed in Spokane, Washington. This package would have an interface to our current general ledger.

IMPACT ON ISD RESOURCES: ISD

Since the division currently has a cost accounting system that is maintained by ISD, it is forecasted that the same resources would be directed at servicing a package--no impact.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
COST ACCOUNTING
DES ADMINISTRATION

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT	$ 10,000
STAFF	$ 0
COST AVOIDANCE	$ 60,000
VALUE ADDED	Unknown
DEVELOPMENT TIME (in weeks)	12
RISK SCORE	23.2

PROJECT DEVELOPMENT COSTS

STAFF	$ 26,000
MATERIALS/SERVICES	$ 50,000
CAPITAL	$ 0
TOTAL	$ 76,000

OPERATIONAL COSTS

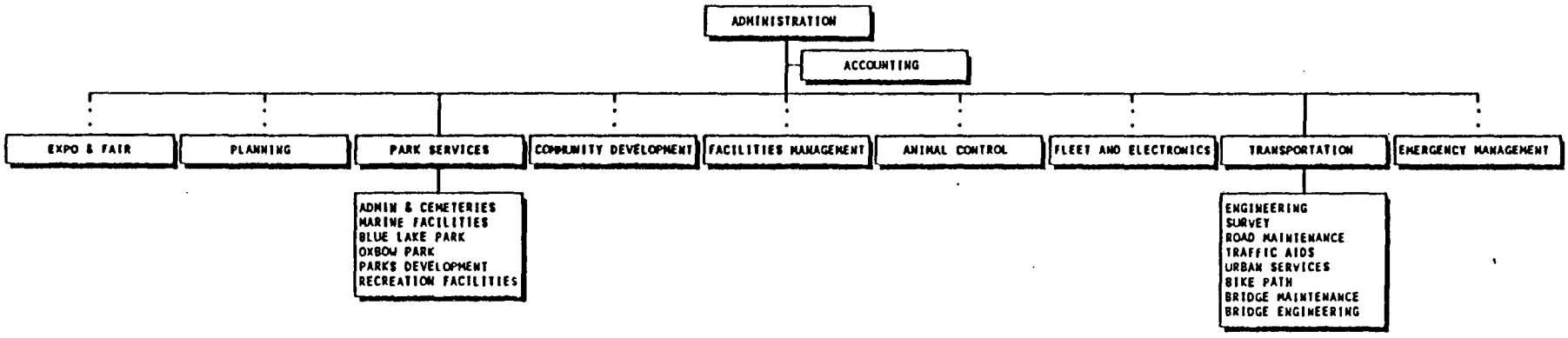
STAFF	$ *
MATERIALS/SERVICES	$
CAPITAL	$
TOTAL	No change

*It is forecasted that the operational costs supporting their existing system will be matched in supporting the new system.

COMMENTS

Cost accounting systems appear to be marketed toward construction companies rather than government agencies, which is why most commercial products run on mini-computers rather than mainframe systems. Several departments throughout the County can utilize cost accounting principles and should be offered a direct interface to general ledger and payroll.

DEPARTMENT OF ENVIRONMENTAL SERVICES
COST ACCOUNTING



RISK ANALYSIS DOCUMENT

System Name: DES Cost Accounting

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	5	3.5
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0.0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0.0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	0	0.0
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	4	8.0
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	0	0.0
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	3	2.1
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	4	4.0
0 -------- 50 -------- 100 LOW RISK HIGH RISK		RISK ASSESSMENT	23.2

DES Cost Accounting
Feasibility Study

ACTIVITY	Planned start	Planned end	Planned duration
Feasibility Study	7-16-90	7-27-90	12ed
Describe Current System	7-16-90	7-17-90	2ed
Define Alternative Solutions	7-18-90	7-18-90	6h
Define Recommended Solution	7-18-90	7-24-90	6ed
Develop Requirements Phase Plan	7-24-90	7-25-90	8h
Perform Phase End Tasks	7-25-90	7-27-90	2ed

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF ENVIRONMENTAL SERVICES
EMERGENCY MANAGEMENT

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES EMERGENCY MANAGEMENT
EMERGENCY RESPONSE SYSTEM

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

According to ORS 401.025 (6) "Emergency program management" includes all the tasks and activities necessary to coordinate and maintain an emergency services system including, but not limited to, program development, fiscal management, coordination with non-governmental agencies and organizations, public information, personnel training and development and implementation of exercises to test the system.

ORS 401.025 (10) "Emergency Services" includes those activities provided by state and local government agencies with emergency operational responsibilities to prepare for and carry out any activity to prevent, minimize, respond to or recover from an emergency. These activities include...etc.

ORS 401.305 Each county of this state shall, and each city may, establish an emergency management agency which shall be directly responsible to the executive officer or governing body of the county or city. The executive officer or governing body of each county and any city which participates shall appoint an emergency program manager who shall have responsibility for the organization, administration and operation of such agency, subject to the direction and control of the County or City. Each emergency management agency shall perform emergency program management functions within the territorial limits of the county or city and may perform such functions outside the territorial limits as required under any mutual aid agreement or as authorized by the county or city.

Executive Order 194 effective January 1, 1988, creates a Multnomah County Office of Emergency Management.

In order to deliver effective and efficient services by first responders, it is necessary to have a system that can support the services they provide by making available emergency management information in an effective and efficient manner. This system is designed to serve the tri-County area to include the American Red Cross in order to coordinate and inform each other of information used by all.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to

identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

Local County and State emergency services organizations were created to safeguard life and property by making maximum use of available manpower, equipment, and other resources in order to minimize the effects of natural or manmade disasters. A National Governors Association Study conducted in 1979 states that resource management is a vital component of a comprehensive program.

In the spring of 1987, a study was made of the emergency management processes. The four phases were defined and the basic information flow was charted. From that study, it was decided that the norther Oregon emergency management agencies could benefit greatly from a centralized information system. The emphasis was on "centralized" since any disaster could possibly involve more than one agency and it was important that all agencies involved received an updated "picture" of the entire area involved.

Currently there is no automated system linking together the area emergency service agencies in order to share information regarding the response activities of emergency management. The hardware capabilities exist but the technical expertise and funding is needed in order to develop the kind of system needed to accomplish this task.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Automating emergency management is no small task as witnessed by the many processes detailed in the study. To preclude a project that will take forever and cost the equivalent of the national debt, specific functions have been defined that the system must perform (in order of priority):

1. Emergency resource inventory management
2. Contract/agreement management
3. Event logging
4. Expense tracking
5. Damage assessment
6. After-action reporting
7. Recovery management
8. Historical disaster recording and projection
9. Program evaluation

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES EMERGENCY MANAGEMENT
EMERGENCY RESPONSE SYSTEM

Project Status:

Function One - Emergency Resource Inventory Management.

System design and programming is being performed by Air Force Reserve personnel assigned to the Multnomah County Office of Emergency Management. The system is an ADABAS/NATURAL application and is in final testing phase on the County's mainframe.

Function Two - Contract/Agreement Management

This subsystem is being addressed by the office's word processing system.

Function Three, Four, and Five are the object of this request. These subfunctions support the response phase of Emergency Management:

EVENT TRACKING: All significant events during an emergency must be logged to include date/time, nature of event, responder, and disposition. This system will allow prioritization of the events and facilitate cleaning up lesser important tasks and preclude them from "falling through the cracks."

EXPENSE TRACKING: Responding to incidents usually always involve expenses that must be accounted for and paid. This subsystem would track all expenditures, the person responsible, and provide a detailed report itemizing all pertinent information for reconciliation.

DAMAGE ASSESSMENT: Most incidents involve damage to property. This subsystem tracks all reported damage during the incident. It will assist in insuring that all reported damage gets recorded and prevent duplicate claims from being processed.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

In order to receive federal funding we are mandated by Administrative Rule to complete an Emergency Operations and Management Plan. A part of this plan is Response Management. If we could automate the information collected and use it regionally, it would assist all of the emergency managers in the metropolitan area in Federal reporting.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

If this project was completed, it would eliminate duplication within the County by three jurisdictions and within the tri-County area by another three jurisdictions. It would increase our ability to meet the needs of the response agencies and the public. It would assist us in doing all the paperwork needed for the State and federal government in declaring disasters because of damage assessment costs could be tallied in a more efficient manner. It would also provide us a better and more efficient mechanism to produce after action reports and costs associated with specific emergencies in a more timely manner. Cost avoidance would occur because data input would be shared by six different jurisdictions and one public agency (Red Cross).

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

There are no funding sources at this time. All project development costs available would strictly be in-kind costs amongst the jurisdictions of Multnomah County, Clackamas County, Washington County, City of Beaverton, City of Portland, City of Gresham, and Red Cross.

There is the possibility of receiving awards after the fact through various sources, i.e., The Ford Foundation and the John F. Kennedy School of Government at Harvard University.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

The resource management system currently runs on the ISD mainframe computer. In order for this part of the system to be integrated, it should reside on the same machine.

The ISD mainframe also accommodates remote dial-in to facilitate multiple jurisdiction access in time of crisis.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES EMERGENCY MANAGEMENT
EMERGENCY RESPONSE SYSTEM

PACKAGE AVAILABILITY: ISD

A search of our resources indicate a lack of commercially or public systems that address the problem. It is unknown whether a qualified system would be available from another local government.

IMPACT ON ISD RESOURCES: ISD

Normal drills and preparation would have little impact on ISD. It is unknown what effects a major disaster would have, but it is obvious that the County would prioritize normal needs to react to the emergency.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT	$ 0
STAFF	$ 0
COST AVOIDANCE	$ 0
VALUE ADDED	$ 0
DEVELOPMENT TIME (in weeks)	30
RISK SCORE	32.6

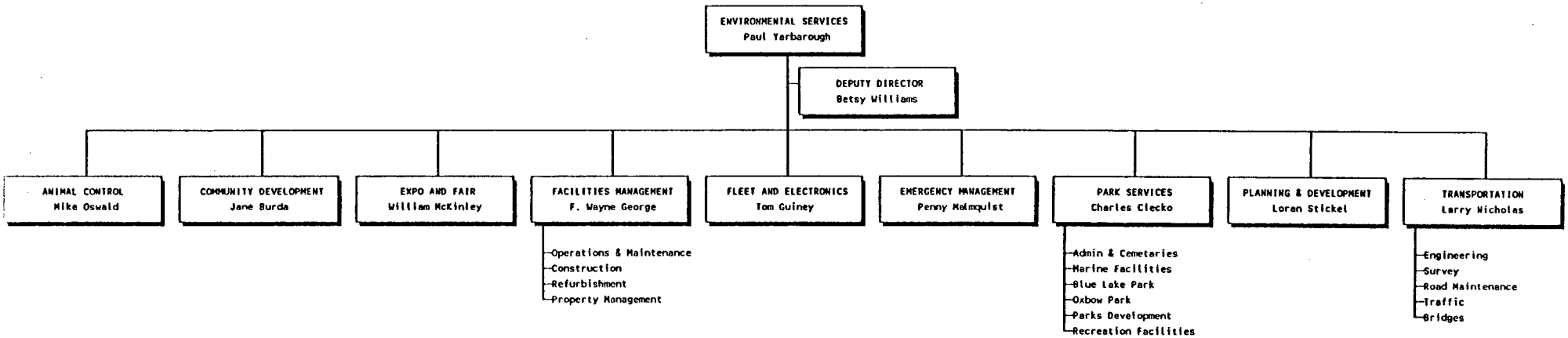
PROJECT DEVELOPMENT COSTS

STAFF	$80,248.00
MATERIALS/SERVICES	$15,000.00
CAPITAL	$ 0
TOTAL	$95,248.00

OPERATIONAL COSTS

STAFF	$ 0
MATERIALS/SERVICES	$ 0
CAPITAL	$ 0
TOTAL	$ 0

COMMENTS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TRANSPORTATION
Larry Nicholas
Engineering
Survey
Road Maintenance
Traffic
Bridges

RISK ANALYSIS DOCUMENT

System Name: Emergency Response System

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	5	7
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	4	8
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	5	5
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	0	0
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	0	0
0 -------- 50 -------- 100 LOW RISK HIGH RISK		RISK ASSESSMENT	32.6

12-06-89

Department of Environmental Services
Emergency Response System

ACTIVITY	Planned cost	Planned duration
Emergency Response System	$80248	174ed
Feasibility Study	$1080	12ed
Describe Current System	$135	1d
Define Alternative Solutions	$135	1d
Define Recommended Solution	$405	3d
Develop Requirements Phase Plan	$135	1d
Perform Phase End Tasks	$270	2d

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF ENVIRONMENTAL SERVICES
PARK RESERVATIONS

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK RESERVATIONS

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Park Service Division of the Department of Environmental Services employs 20.5 FTEs and has an 1989-90 budget of $2,605,517. The division operates and maintains the County's regional park facilities, which offer a wide range of recreational activities for metropolitan area residents, and historic cemeteries. Sections within the division are: Administration, Cemeteries, Marine Facilities, Blue Lake Park, Oxbow Park, Park Development, and Recreational Facilities.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

Over 700 reservations are received at the County parks. These transactions are currently being recorded manually and tracked by hand.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Provide on-line access to picnic and campground reservations, monitor payments and permit fees, and produce management information detailing visitations, fiscal accounting, and alternative labor costs.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

The Parks Reservation System would provide for more efficient and effective delivery of parks services, while improving the cost effectiveness and responsiveness of parks services at Oxbow and Blue Lake Parks, 43rd Ave. Boat Ramp, neighborhood parks, and other special facilities.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK RESERVATIONS

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

The system will replace the archaic paper system and provide more efficient use of limited staff time. Data will be shared with Park operational staff and formatted for public uses, i.e., billings confirmations, and receipts for the 700 annual reservations.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

Unknown.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

The benefits of data sharing for information in this system are low and system compatibility is not a major factor. The need for remote access is not required.

PACKAGE AVAILABILITY: ISD

A search of our resources indicate a lack of commercially or public systems that address the problem. It is unknown whether a qualified system would be available from another local government.

IMPACT ON ISD RESOURCES: ISD

From the information given so far, it is assumed that this project would be a small one and have minimal impact on ISD resources.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK RESERVATIONS

ESTIMATED BENEFITS

COST DISPLACEMENT	$	0
STAFF	$	0
COST AVOIDANCE	$	0
VALUE ADDED	$	0
DEVELOPMENT TIME (in weeks)		26
RISK SCORE		23.4

PROJECT DEVELOPMENT COSTS

STAFF	$57,906.00
MATERIALS/SERVICES	$10,000.00
CAPITAL	$ 1,788.05[1]
TOTAL	$69,694.05

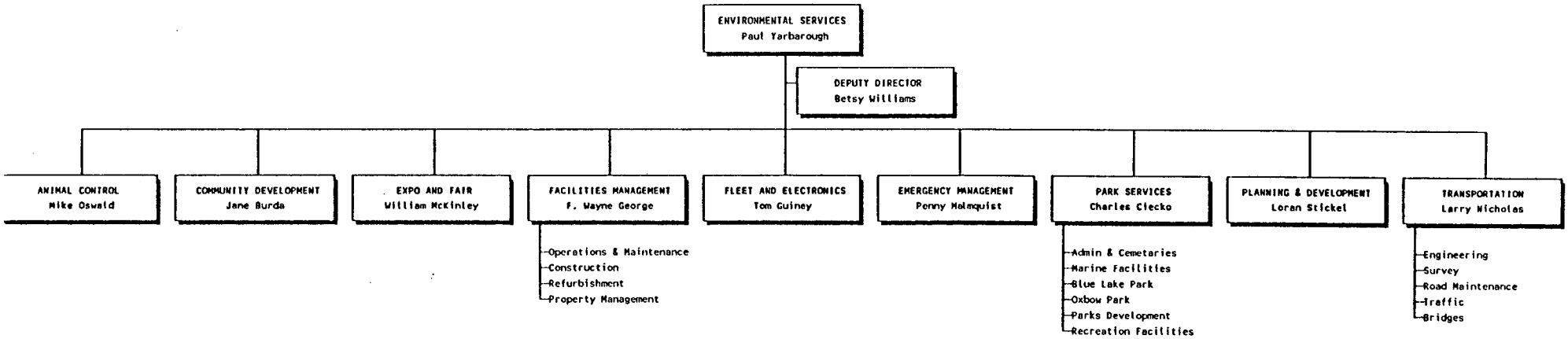
OPERATIONAL COSTS

STAFF	$ 0
MATERIALS/SERVICES	$ 7,960.00
CAPITAL	$ 0
TOTAL	$ 7,960.00[2]

COMMENTS

1 Equipment costs for two terminals and one printer.
NOTE: Would not be needed if Park Finance SOA is approved.

2 ISD hookup charges: $3,960 - $4,000 for annual system operation.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Larry Nicholas
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Road Maintenance
Traffic
Bridges

RISK ANALYSIS DOCUMENT

System Name: Park Reservations

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	2	2.8
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	2	4
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	0	0
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	0	0
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	4	4

0 -------- 50 -------- 100
LOW RISK HIGH RISK

RISK ASSESSMENT 23.4

12-05-89	Department of Environmental Services Park Reservations	1/1
ACTIVITY	Planned cost	Planned duration
Park Reservations	$52636	129ed
Feasibility Study	$1080	12ed
Describe Current System	$135	1d
Define Alternative Solutions	$135	1d
Define Recommended Solution	$405	3d
Develop Requirements Phase Plan	$135	1d
Perform Phase End Taks	$270	2d

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF ENVIRONMENTAL SERVICES
PARK REVENUE

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK FINANCE

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Park Service Division of the Department of Environmental Services employs 20.5 FTEs and has an 1989-90 budget of $2,605,517. The division operates and maintains the County's regional park facilities, which offer a wide range of recreational activities for metropolitan area residents, and historic cemeteries. Sections within the division are: Administration, Cemeteries, Marine Facilities, Blue Lake Park, Oxbow Park, Park Development, and Recreational Facilities.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

Park revenue and expenditures are processed into the general ledger by hand and there is no way to track park expenditures by source and/or contract.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Supplement the current fiscal reporting system by tracking incoming park revenues, such as grants, donations, vendor fees, etc., and expenditures by source and/or contract.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

The project will finance and deliver services more accurately, provides for better evaluation of programs with more accurate fiscal measures, and supports the protection of promotion of County natural resources.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK FINANCE

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Park Service Division of the Department of Environmental Services employs 20.5 FTEs and has an 1989-90 budget of $2,605,517. The division operates and maintains the County's regional park facilities, which offer a wide range of recreational activities for metropolitan area residents, and historic cemeteries. Sections within the division are: Administration, Cemeteries, Marine Facilities, Blue Lake Park, Oxbow Park, Park Development, and Recreational Facilities.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

Park revenue and expenditures are processed into the general ledger by hand and there is no way to track park expenditures by source and/or contract.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Supplement the current fiscal reporting system by tracking incoming park revenues, such as grants, donations, vendor fees, etc., and expenditures by source and/or contract.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

The project will finance and deliver services more accurately, provides for better evaluation of programs with more accurate fiscal measures, and supports the protection of promotion of County natural resources.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK FINANCE

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

Fiscal displacement will occur with greater assurance that funds are deposited and withdrawn from the appropriate account. Adds greater accounting control at the management source and adds value by reducing inappropriate charges against park accounts.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

None.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

This information does not have a need to be shared by organizations outside of the division. It does need an interface to the County's general ledger.

The need for remote access is not required.

PACKAGE AVAILABILITY: ISD

A search of our resources indicate a lack of commercially or public systems that address the problem. It is unknown whether a qualified system would be available from another local government.

IMPACT ON ISD RESOURCES: ISD

From the information given so far, it is assumed that this project would be a small one and have minimal impact on ISD resources. Estimate: $10,000 operational costs (assuming 2 terminals).

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DES PARKS SERVICES
PARK FINANCE

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS	
COST DISPLACEMENT	$ 0
STAFF	$ 0
COST AVOIDANCE	$ 0
VALUE ADDED	$ 0
DEVELOPMENT TIME (in weeks)	25
RISK SCORE	35.6

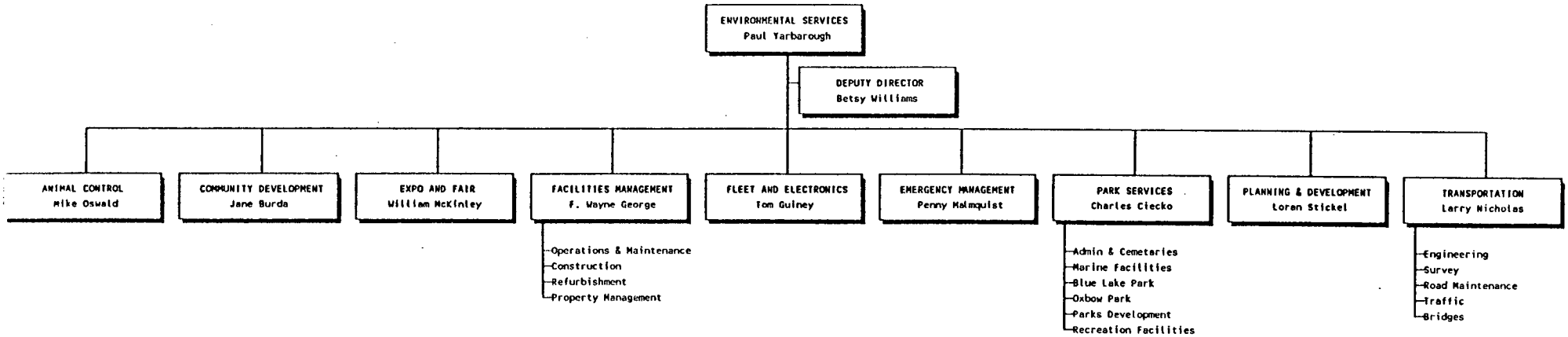
PROJECT DEVELOPMENT COSTS	
STAFF	$52,186.00
MATERIALS/SERVICES	$10,000.00
CAPITAL	$ 1,788.05[1]
TOTAL	$63,974.05

OPERATIONAL COSTS	
STAFF	$ 0
MATERIALS/SERVICES	$ 7,960.00[2]
CAPITAL	$ 0
TOTAL	$ 7,960.00

COMMENTS

1 Equipment costs for two terminals and one printer.
NOTE: Would not be needed if Park Reservation SOA is approved.

2 Three terminal hookups for one year; $4,000 for annual system operation.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TRANSPORTATION
Larry Nicholas
Engineering
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Road Maintenance
Traffic
Bridges

RISK ANALYSIS DOCUMENT

System Name:

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	8	8
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	5	7
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	4	8
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	0	0
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	0	0
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	0	0
0 -------- 50 -------- 100 LOW RISK HIGH RISK		RISK ASSESSMENT	35.6

12-05-89 | Department of Environmental Services
Park Revenue | 1/1

ACTIVITY	Planned cost	Planned duration
Park Revenue	$52186	125ed
Feasibility Study	$1080	12ed
Describe Current System	$135	1d
Define Alternative Solutions	$135	1d
Define Recommended Solution	$405	3d
Develop Requirements Phase Plan	$135	1d
Perform Phase End Taks	$270	2d

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF GENERAL SERVICES
PURCHASING

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DGS - PURCHASING
PURCHASING/INVENTORY SYSTEM

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The inventory purchasing system was purchased in 1982 to assist the purchasing division in the efficient procurement of goods and services and the management of the central stores inventory. The Walker PO (purchase order) and MM (material management) are two separate but integrated products that provides online real time assistance to the users of the system.

PO (Purchase Order) Functions:

- Vendor Processing. A user is able to add vendors to a vendor data base with an online transaction. Once added, vendor information can be viewed through a terminal and updated as desired.

- Requisition Processing. Requisition data is entered online to the system. The requisition then can be reviewed and modified by the buyers.

- Request for Quotation. When a buyer wants to determine the best price and terms for an order, they use the system to develop a Request for Quotation (RFQ) purchase order for each vendor from which they wish to bid.

- Purchase Order Processing. Once a vendor is on the vendor data base, purchase orders can be generated from the requisition data entered.

- Purchase Order Authorization. Once all purchase order data is entered, the PO can be printed. An individual with proper authority uses a transaction to balance and validate the purchase order. This transaction authorizes the PO for printing.

- Purchase Order Printing. After a purchase order is authorized, it can be printed on an online printer. Purchase orders are printed on pre-printed forms.

- Supplement (Change Order) Processing. When a buyer wishes to change a purchase order, they may do so by generating a supplement to the original order. Typically, change orders are for

  o Change in prices
  o Change in quantities
  o New or deleted line items.

- Audit Trails. As transactions are entered online, the system maintains a record of each transaction successfully posted to the data base. This record includes all information entered as well as terminal number, user password, date and time.

- Management Reporting. The system provides a wide variety of reports from the transaction file and any data base and tables used by the system.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

The current Walker inventory/purchasing system does not interface with the County's Accounts Payable and General Ledger system. The lack of an automated interface results in duplicate data entry, duplicate vendor files and many errors. The system does not have an accurate way of tracking "active" vendors, thereby allowing us to purge "inactive" vendors. We also cannot rotate the vendor lists, as we would like because the Walker system does not track bid processing.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

Replaces Walker Purchasing Software System with LGFS on-line Purchasing and Inventory Control System. The software would create a fully integrated financial management and purchasing system.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

It will enhance efficiency by reducing duplicated entry, increased accuracy and reduce big tabulation errors; allows users to go on-line to view purchases; encourages competition by purging and rotating vendor bid lists; enables enforcement of certain purchasing laws, i.e., tax delinquents and local preferences; allows distribution of more than one

code which will eliminate need for journal vouchers; expenditure controls are possible on the system (reduce budgets oversight); enhance our inventory control.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

Labor savings and improved accuracy are evident but not assessed yet. Maintenance cost will be reduced by $25,000 annually; return on investment is maximum 4 years, possible 3 years.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

None.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY: ISD

Since the general ledger currently exists on the ISD mainframe, this system, in order to meet the needs as stated, must run on the same machine.

PACKAGE AVAILABILITY: ISD

(See American Management Systems, Inc. description of the Extended Purchasing and Inventory Subsystems attached.)

IMPACT ON ISD RESOURCES: ISD

Since the County is currently running an inventory/purchasing system, replacing it with this system would not have an adverse effect on ISD resources. There may be an additional load placed on the system if both are running concurrently, but it is not deemed to be significant.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DGS - PURCHASING
PURCHASING/INVENTORY SYSTEM

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT	$	
STAFF	$	
COST AVOIDANCE	$	
VALUE ADDED	$	
DEVELOPMENT TIME (in weeks)		6
RISK SCORE		28

PROJECT DEVELOPMENT COSTS

STAFF	$ 19,701.00
MATERIALS/SERVICES	$140,000.00[1]
CAPITAL	$ 0
TOTAL	$159,701.00

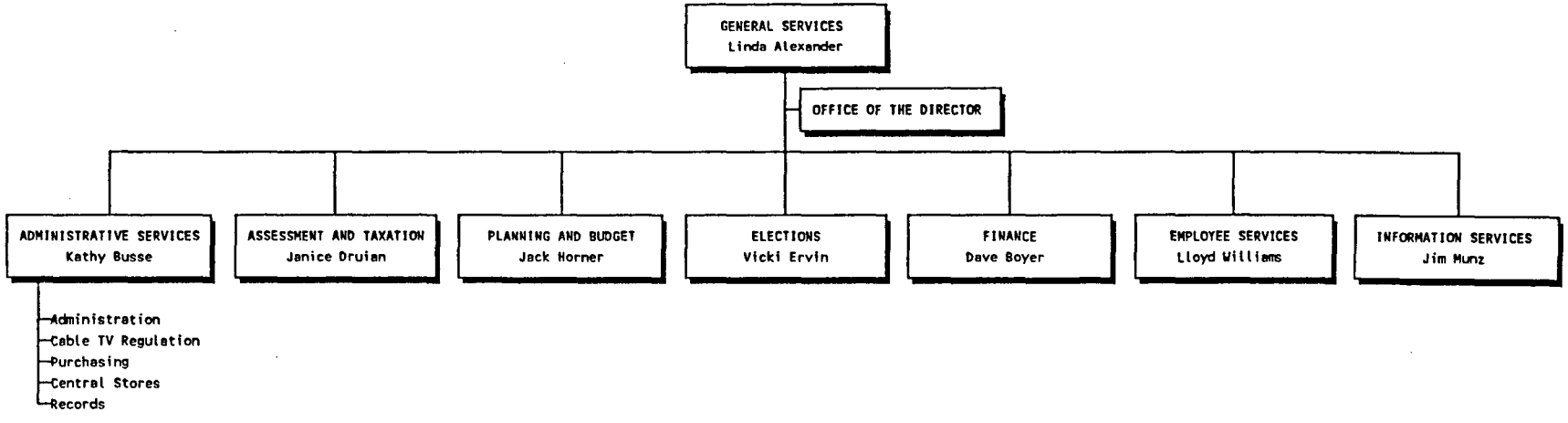
OPERATIONAL COSTS

STAFF	$	*
MATERIALS/SERVICES	$	
CAPITAL	$	
TOTAL	$	

COMMENTS

[1] Purchasing module $60,000
Inventory module $55,000
Training (on-site) $25,000

* Current operational costs are estimated to equal the costs of running the new system.


GENERAL SERVICES
Linda Alexander
OFFICE OF THE DIRECTOR
ADMINISTRATIVE SERVICES
Kathy Busse
ASSESSMENT AND TAXATION
Janice Druian
PLANNING AND BUDGET
Jack Horner
ELECTIONS
Vicki Ervin
FINANCE
Dave Boyer
EMPLOYEE SERVICES
Lloyd Williams
INFORMATION SERVICES
Jim Munz
Administration
Cable TV Regulation
Purchasing
Central Stores
Records

RISK ANALYSIS DOCUMENT

System Name: Purchasing/Inventory

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	5	3.5
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	2	2.8
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	7	14
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	0	0
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	3	2.1
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	0	0
0 -------- 50 -------- 100 LOW RISK HIGH RISK		RISK ASSESSMENT	28.0

ACTIVITY	Planned cost	Planned duration
Purchasing/Inventory System	$19701	59ed
Feasibility Study	$1080	12ed
Describe Current System	$135	1d
Define Alternative Solutions	$135	1d
Define Recommended Solution	$405	3d
Develop Requirements Phase Plan	$135	1d
Perform Phase End Tasks	$270	2d

Introduction

The Extended Purchasing (EPS) and Inventory (INV) Subsystems, together with the Local Government Financial System (LGFS), provide an economical, integrated systems approach for county and city governments to provide timely, cost-effective procurement and materials management.

Local government materials management has very specific system requirements. Until EPS and INV were developed by AMS in 1984, these requirements were generally overlooked in the development of governmental financial management and accounting systems. Also, most other materials management systems were developed as private sector manufacturing systems and modified for government use. However, EPS and INV have been developed and designed specifically for use by local governments.

Managers in local government have little time to manage and administer their purchasing and inventory responsibilities today. Each year, thousands of requisitions, bid solicitations, purchase orders, inventory stock requests, receiving reports, and invoices are processed in the procurement cycle. For the most part, as the workload grows, the local government has fewer personnel in each new budget year to accomplish the same tasks.

This results in the purchasing and inventory departments not always being able to buy the best quality at the best price or stock at the right levels. Often, the time required to complete the procurement process lengthens from days to weeks or even months. End users are usually very critical of the longer time required to provide needed materials and services.

Integration of Materials Management and Accounting

The EPS and INV subsystems provide the capabilities needed to support purchasing and inventory operations and their requisitioners, while integrating the data with the financial system for encumbrance control. This is accomplished in a single system, with single transaction entry and an integrated data base. LGFS will meet the specific needs of your financial and accounting departments, while meeting the requirements of an efficient and professional materials management organization.

Menu and Help Screens

System screens can be accessed directly, by typing in the screen name, or through a series of menus. On-line help is available for each screen and process in the system. Whenever the user makes an error, the system provides a message that defines the error and its level of severity within the system.

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF HUMAN SERVICES
JUVENILE JUSTICE

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DHS - JUVENILE JUSTICE
JUVENILE INFORMATION SYSTEM

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Juvenile Justice Division provides services to delinquent and dependent youth. These services include:

1. Provide secure custody detention services and programs for youth from Multnomah, Clackamas, and Washington Counties.

2. Provide youth skill development activities and training.

3. Provide probation services including assistance, monitoring, and reporting.

4. Provide adjudication and dependency services to interface directly with the state Court system.

5. Provide probation support programs such as restitution, employment and training, community service, and volunteer programs.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

The current computer system (Tri-County Juvenile Information System) was designed seven years ago as a case tracking system. The juvenile data base resides on Multnomah County's Amdahl mainframe computer. The system does not lend itself to accessible management and program information.

The system is complex and lacks flexibility. The system requires constant reviewing, monitoring, and manipulation based on Division internal changes, changes in statutes, a changing population, and community concerns and demands.

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

The proposed solution, contingent on the results of a requirements analysis, is to implement an already existing juvenile justice information system called Juvenile On-Line Tracking System (JOLTS). JOLTS was developed by staff at the Maricopa County (Phoenix, Arizona) Juvenile Court Center. The system has been operational since 1977 and was implemented on the IBM System 38 computer in 1986. JOLTS is written in COBOL programming language.

JOLTS is a large and well integrated system. It has many features such as case tracking, automatic case assignment, standard and customized reports, automatic form letter generation, electronic files, court calendaring, electronic messaging (automatically and on demand), on-line cross indexing, on-line statistics, on-line access to manuals and policies, and integration of case tracking information with office automation features.

The proposed project to be funded by the Data Processing Management Committee (DPMC) would include the cost of modifying the JOLTS software based on the needs determined in the requirements analysis and the computer system to be installed in the Juvenile Justice Division to run JOLTS ($50,000). Other costs to be included are for the lease/purchase of a computer system for the Juvenile Justice Division ($38,000 for the first year) and corresponding maintenance ($7000 for the first year). It would also include costs for training staff in the use of JOLTS and the new system ($18,000) and for labor and materials involved in purchasing and installing the cabling required for the new system and devices ($12,000). The total cost of the proposal to be funded by the DPMC is $125,000.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

To function smoothly, the Juvenile Justice Division requires a variety of information, easily retrievable by all staff upon demand. Effective program development and implementation of services to client is dependent on the ability to obtain statistical and evaluative information.

Identification of clients and appropriate application of program needs must be based on informed decisions. Access to information to monitor and evaluate the change in environment within the Division with the youth served is essential to ensure efficient and effective distribution of program dollars.

The ability of this system to interface with other information systems is critical to the mission of the Division. The interface with other Multnomah County systems and other information systems that have relevant

data on the youth served by the Division is necessary to provide effective services.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

The availability of information would increase efficiency and improve the quality of service provided by the Juvenile Justice Division and the District Attorney's program unit. Case planning, supervision, and management relative to our mission would be based on more meaningful and complete information. Future cost savings would be realized through proactive planning and evaluation of new programs prior to implemention.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

None.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SYSTEM COMPATIBILITY:

Juvenile information needs to be accessed remotely by the division's three District Offices located in Multnomah County, the juvenile unit of the District Attorney, and the State of Oregon Juvenile Court. Strict security must be maintained to protect very sensitive data and which can be controlled locally by the juvenile division. The system must be capable of downloading relevant information to be utilized by authorized agencies operating on a variety of hardware platforms to include personal computers.

PACKAGE AVAILABILITY:

The JOLTS software is available at no cost from Maricopa County.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DHS - JUVENILE JUSTICE
JUVENILE INFORMATION SYSTEM

IMPACT ON ISD RESOURCES:

ISD will be involved with converting information from the Tri-County Juvenile Information System (TJIS) database to the JOLTS files drawing upon the Fiscal Year 90/91 dollars already budgeted for the maintenance of the existing system.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT	$
STAFF	$
COST AVOIDANCE	$
VALUE ADDED	$
DEVELOPMENT TIME (in weeks)	35
RISK SCORE	61.1

PROJECT DEVELOPMENT COSTS

STAFF	$
MATERIALS/SERVICES	$ 68,000
CAPITAL	$ 57,000
TOTAL	$125,000

OPERATIONAL COSTS

STAFF	$
MATERIALS/SERVICES	$ 74,375
CAPITAL	$216,750
TOTAL	$291,125*

COMMENTS

Operating costs are for 4.25 years beyond 1990/91 project development period.

RISK ANALYSIS DOCUMENT

System Name: Juvenile Justice

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	5	3.5
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	4	6
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	10	10
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	5	7
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	7	14
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	3	3
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	10	7
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	5	5

0 -------- 50 -------- 100
LOW RISK HIGH RISK

RISK ASSESSMENT 61.1

MULTNOMAH COUNTY OREGON

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF HUMAN SERVICES
SOCIAL SERVICES INTEGRATED CLIENT SERVICES SYSTEM

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF HUMAN SERVICES
SOCIAL SERVICES INTEGRATED CLIENT SERVICES SYSTEM

BACKGROUND NARRATIVE: Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

The Social Services Division is a 30+ million dollar operation within the Department of Human Services. The majority of the division's revenue comes from the state with the majority of service provided via contracts with private, non-profit agencies.

The division is responsible for contract development, and fiscal and programmatic monitoring of approximately 200 contracts in any fiscal year. Fiscal reports from the contract agencies comes directly to the division. Program information is sent by the contract providers directly from the state. The division receives dated management information reports from the state. Read-only inquiry capability is accessible to the division staff through one Courier terminal running through the Amdahl to the state CPMS system. Some data manipulation via FOCUS on the state system is being pilot tested with the division.

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION: Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

The Social Services Division does not have an integrated client services system. Major programs within the division have either a standalone database/information services system (Youth Program Office), or access the State's CPMS database/information services system. In the CPMS situation each program (Mental and Emotional Disabilities, Development Disabilities, and Alcohol and Drug) has different enrollment, termination, and activity forms to record client services.

Ready access to case monitoring data is limited on the state system (CPMS) and severely time-delayed on the management information side (summary reports, other aggregate-type data).

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF HUMAN SERVICES
SOCIAL SERVICES INTEGRATED CLIENT SERVICES SYSTEM

PROJECT DESCRIPTION: Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

1. A requirements study to establish the nature and design of a "pass-through" data collection system for the entire Social Services Division; and

2. Funding to develop and implement the identified Social Services Integrated Client Services System.

STRATEGIC CONTRIBUTION: Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section

To function smoothly, the division requires a variety of information, easily retrievable by all staff upon demand. Effective program development, implementation, and monitoring of services to clients is dependent on the ability to obtain statistical and evaluative information.

TANGIBLE BENEFITS: Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

The availability of information would increase efficiency and improve the quality of services provided by the Social Services Division and their contract agencies.

FUNDING SOURCES: Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

Funding will be dependent upon the Data Processing Management Committee special annual allocation.

TECHNICAL ASSESSMENT: TO BE COMPLETED BY ISD

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT OF HUMAN SERVICES
SOCIAL SERVICES INTEGRATED CLIENT SERVICES SYSTEM

SYSTEM COMPATIBILITY: ISD

The system would have to collect information from widely dispersed remote terminals, centralize information from all five programs, and interface to include data transmittal to the Department of Human Resources mainframe in Salem, Oregon.

PACKAGE AVAILABILITY: ISD

A search of our resources indicate a lack of commercially or public systems that address the problem. It is unknown whether a qualified system would be available from another local goverment.

IMPACT ON ISD RESOURCES: ISD

The amount of information gathered from the five programs of Social Services could be voluminous. With the exception of the possible need for more disk space and assuming that no more than 30 additional devices will be added to the network, it is not estimated that the system will adversely effect ISD.

ESTIMATE SUMMARY SECTION: This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT	$ 0
STAFF	$ 0
COST AVOIDANCE	$ 0
VALUE ADDED	$ 0
DEVELOPMENT TIME (in weeks)	30
RISK SCORE	33.7

PROJECT DEVELOPMENT COSTS

STAFF	$ 97,056.00[1]
MATERIALS/SERVICES	$ 15,000.00[2]
CAPITAL	$ 20,000.00
TOTAL	$132,056.00

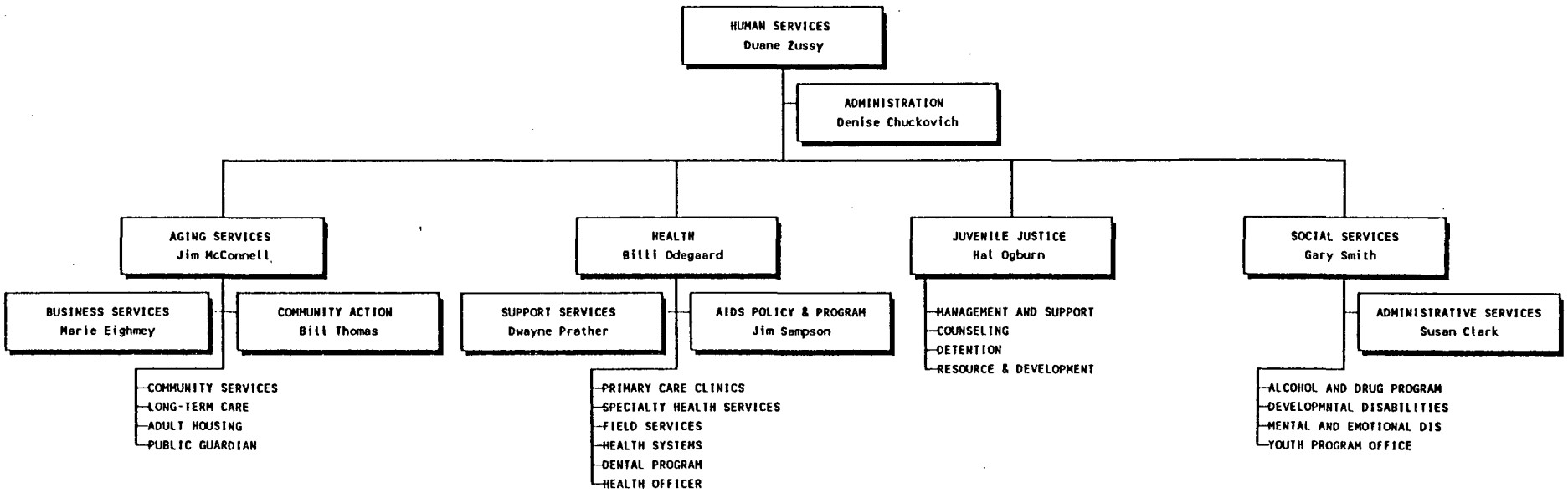
OPERATIONAL COSTS

STAFF	$ 0
MATERIALS/SERVICES	$ 0
CAPITAL	$ 0
TOTAL	$ 0

COMMENTS

1 On-line development costs.

2 It is assumed that additional terminals will be needed to replace the state devices.


HUMAN SERVICES
Duane Zussy
ADMINISTRATION
Denise Chuckovich
AGING SERVICES
Jim McConnell
BUSINESS SERVICES
Marie Eighmey
COMMUNITY ACTION
Bill Thomas
COMMUNITY SERVICES
LONG-TERM CARE
ADULT HOUSING
PUBLIC GUARDIAN
HEALTH
Billi Odegaard
SUPPORT SERVICES
Dwayne Prather
AIDS POLICY & PROGRAM
Jim Sampson
PRIMARY CARE CLINICS
SPECIALTY HEALTH SERVICES
FIELD SERVICES
HEALTH SYSTEMS
DENTAL PROGRAM
HEALTH OFFICER
JUVENILE JUSTICE
Hal Ogburn
MANAGEMENT AND SUPPORT
COUNSELING
DETENTION
RESOURCE & DEVELOPMENT
SOCIAL SERVICES
Gary Smith
ADMINISTRATIVE SERVICES
Susan Clark
ALCOHOL AND DRUG PROGRAM
DEVELOPMNTAL DISABILITIES
MENTAL AND EMOTIONAL DIS
YOUTH PROGRAM OFFICE

RISK ANALYSIS DOCUMENT

System Name: Social Services Integrated Client Services System

(TECHNICAL FACTORS)	WEIGHTING FACTOR	EVALUATION	WEIGHTED VALUE
Type of Project Enhancement=0, Package=5, New System=10	.7	10	7
Technology Assessment Range: Proven/Familiar=0, Theoretical/Unknown=10	1.5	0	0
New Resources Required None=0, Hardware=5, People Skills=8, System Software=10	1.0	0	0
Development Time 0-3 MO=0, 3-6 MO=2, 6-9 MO=5, 9-12 MO=8, 12+ MO=10	1.4	5	7
Development Cost $0-25,000=0, $25,000-50,000=2, $50,000-100,000=4, $100,000-250,000=7, Over $250,000=10	2.0	4	8
(BUSINESS FACTORS)			
Impact on Management Decisions None=0, Low=4, Decision Support=8, Automated Decisions=10	.7	8	5.6
ISD Judgment of Business Requirements In Design Low=0, Medium=5, High=10	1.0	0	0
Stability of Business Environment Static=0, Some Change=3, Rapid Change=6, Dynamic Change=10	.7	3	2.1
Impact of Implementation Moderate Changes=0, Divisional=4, Departmental=6, Countywide=8, External to County=10	1.0	4	4
0 -------- 50 -------- 100 LOW RISK HIGH RISK		RISK ASSESSMENT	33.7

Department of Human Services

12-18-89 Social Services Integrated Client System 1/1

ACTIVITY	Planned cost	Planned duration
Social Services Integrated Client	$97056	202ed
System Opportunity Assessment	$135	1d
Feasibility Study	$4122	16ed
Describe Current System	$336	1d
Define Alternative Solutions	$336	1d
Define Recommended Solution	$1725	5d
Develop Requirements Phase Plan	$672	2d
Perform Phase End Tasks	$1053	3d
Requirements Analysis	$35695	80ed
System Designa	$37250	10w
Construction	$12044	4w
Delivery	$7810	2w

DJS

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT
DEPARTMENT - DIVISION
PROJECT PROPOSAL NAME

The System Opportunity Assessment highlights the potential benefits of an automated system so the Data Processing Management Committee can evaluate proposals against other needs in the County. Although this is a first cut assessment of a potential system it should include enough information for the DPMC to evaluate the benefits of the project.

Please complete each of the forms up to the Technical Assessment, attach an organization chart showing where the division or section which will be using the system fits into the County structure, and return the package to your ISD System Manager. Remember to include the Department, Division and Project Proposal Name at the top of each page below the page title.

Your ISD System Manager will complete the Technical Assessment section, develop a project plan and schedule a meeting with you to complete the Estimate Summary section.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT

BACKGROUND NARRATIVE : Describe the division or section which will be using the proposed system as well as the services which the division or section provides. Include enough information to summarize the scope of services and responsibilities of that division or section.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT

PROPOSED PROJECT DESCRIPTION

PROBLEM DEFINITION : Describe the current or anticipated problem area or issue that the project will attempt to resolve. Provide enough detail to identify the major issues involved such as but not limited to the loss of funding, management control or business conditions.

PROJECT DESCRIPTION : Describe the proposed solution to the problem(s) identified above in non-technical terms. Identify the project goals and activities in general terms.

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT

STRATEGIC CONTRIBUTION : Describe how the project would support the mission and/or strategic direction of the division or section. Provide any additional information on how the system would be a benefit to the division or section.

TANGIBLE BENEFITS : Quantify the tangible (measurable to some degree) benefits expected from the proposed system project.

FUNDING SOURCES : Describe any funding sources external to the DPMC such as State/Federal grants or matching programs and departmental budgets. Please include the amount of funding available and any restrictions placed on the use of the funds.

TECHNICAL ASSESSMENT : **TO BE COMPLETED BY ISD**

SYSTEM COMPATIBILITY : ISD

PACKAGE AVAILABILITY : ISD

SDM/IE - SYSTEM OPPORTUNITY ASSESSMENT

IMPACT ON ISD RESOURCES : ISD

ESTIMATE SUMMARY SECTION : This section will be completed by the requesting Department/Division/Section and the responsible ISD System Manager after the Background Narrative, Proposed Project Description, Technical Assessment and Organization Chart are done.

ESTIMATED BENEFITS

COST DISPLACEMENT _____
STAFF _____
COST AVOIDANCE _____
VALUE ADDED _____

DEVELOPMENT TIME _____
(in weeks)

RISK SCORE _____

PROJECT DEVELOPMENT COSTS

STAFF _____
MATERIALS/SERVICES _____
CAPITAL _____

TOTAL _____

OPERATIONAL COSTS

STAFF _____
MATERIALS/SERVICES _____
CAPITAL _____

TOTAL _____

COMMENTS

APPENDIX

ISD SYSTEM SURVEY RESULTS

SYSTEM: MAGD **NAME:** RECORDS AND INDEXING

DEP/DIV: DGS/ASSESSMENT AND TAXATION **YEAR IMPLEMENTED:** 1978

The Records Management Indexing system's purpose is to store data captured from recorded documents and produce required reports from the data.

VERY SATISFIED. The client is very satisfied with this system. The system captures the correct data and produces reports as required.

SYSTEM: MAGE **NAME:** SALES

DEP/DIV: DGS/ASSESSMENT AND TAXATION **YEAR IMPLEMENTED:** 1987

The Assessment and Taxation Sales System tracks sales of property within the County each year. The sales price and characteristics of the sale property at the time of the sale are maintained.

VERY SATISFIED. The system was developed about two years ago and answers most needs of the client. Some major modifications are in progress because of new State Department of Revenue requirements.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MAGR **NAME:** TAX ROLL PREPARATION

DEP/DIV: DGS/ASSESSMENT AND TAXATION **YEAR IMPLEMENTED:** 1979

The Tax Roll Preparation System is comprised of approximately 150 jobs. The system contains five subsystems: Roll Reporting, Request Reporting, Trending, Daily Processing, and the XL40 System. The first four of the above subsystems maintain the following master files: Roll, Table, Sales, and the Characteristics file. The system maintains approximately 300,000 accounts which are comprised of Real Property, Personal Property, and Utility Accounts.

MARGINALLY SATISFIED. The current systems are under reconstruction. There is a project in progress which will define whether the new systems will be replaced with in-house developed systems or purchased packages.

SYSTEM: MAGR **NAME:** RESIDENTIAL CHARACTERISTICS

DEP/DIV: DGS/ASSESSMENT AND TAXATION **YEAR IMPLEMENTED:** 1988

The Residential Characteristics system purpose is to store the property characteristics for all residential vacant land, single family dwellings, and condominium properties. In addition, the system stores land and improvement tables used to generate value and calculates values using this data and updates the roll file with the new values.

SATISFIED. This system was developed during the last year. The client is satisfied with the system, but has need for additional types of property to be added, such as, apartments and mobile homes.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MEAR **NAME:** COST ACCOUNTING

DEP/DIV: DES/ACCOUNTING **YEAR IMPLEMENTED:** 1982

The DES Cost Accounting System does monthly cost accounting reports for all divisions within the DES Department. The majority of data provided to the system is entered in a batch mode. Edited data is stored in an on-line ADABAS file until it has been verified and corrected on-line by the DES Accounting Section. When this process has been completed, a batch update program is run and the monthly reports produced.

FAIRLY SATISFIED. The client cites difficulty in maintenance and lack of flexibility.

SYSTEM: MEDP **NAME:** ANIMAL CONTROL

DEP/DIV: DES/ANIMAL **YEAR IMPLEMENTED:** 1985

The license system provides the foundation for registration and licensing of dogs, cats, livestock and exotic pets in Multnomah County. Approximately 60,000 dogs and cats are licensed each year with a few hundred miscellaneous facility permits (multiple animals) livestock registrations and exotic permits issued. Records are kept on each owner and animal licenses and from these records lost animals are reunited with owners, renewal forms and delinquent notices are sent to insure licensing of all animals in Multnomah County.

QUITE SATISFIED. Data line problems in Troutdale cause their system to crash.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MEPA **NAME:** LAND USE PLANNING

DEP/DIV: DES/PLANNING **YEAR IMPLEMENTED:** 1985

The land use data system is intended to provide planners in Multnomah County jurisdictions with basic land use information. Data will be accessed from a data base to produce transaction-oriented terminal screen reports on a property basis and to produce user written batch reports consisting of data aggregation, cross tabulation and analysis.

FAIRLY SATISFIED. The system is under utilized due to the clumsy transfer to A&T and back.

SYSTEM: MERR **NAME:** ROAD STATUS

DEP/DIV: DES/TRANSPORTATION **YEAR IMPLEMENTED:** 1984

The DES Master Road System is a computer inventory of dedicated roads that are under Multnomah County road Maintenance jurisdiction. The Master Road File is used in a variety of ways, primarily by the DES office and field personnel. The file is used daily as a reference of historical road data by engineers, road supervisors and managers. The file is also used to prepare the annual pavement management program, and a five-year road capital improvement program.

FAIRLY SATISFIED. The system needs an interface to the Sign Maintenance System (Milepost System).

ISD SYSTEM SURVEY RESULTS

SYSTEM: MERS **NAME:** SIGN MAINTENANCE

DEP/DIV: DES/TRANSPORTATION **YEAR IMPLEMENTED:** 1985

This is a system to input sign truck reports from Multnomah County's sign shop.

Three files are used: SIGN-INVENTORY contains data describing the characteristics of a certain sign, SIGN-ACTIVITY holds information describing the action and reason for action when performing work on this sign at a particular date, and SIGN-CODE contains sign codes and messages.

VERY SATISFIED. This system will be integrated with other transportation systems via the Milepost System.

SYSTEM: MHDA **NAME:** ENVIRONMENTAL HEALTH

DEP/DIV: DES/HEALTH **YEAR IMPLEMENTED:** 1984

This automated system aids the Environmental Health Division in the issuance and renewal of licenses and in the maintenance of records on inspections done for restaurants, multiple dwellings, motor courts, and swimming pools. The licensing and renewal subsystem produces the Licenses, the License Renewal Forms; posts the license fees received; and generates reports required by the State of Oregon. The inspection tracking subsystem records, for each inspection, the outcome, class assignment, inspector, and date of next inspection. A list of establishments to be inspected is automatically produced for each week.

VERY SATISFIED. Some information is duplicated in a PC and the mainframe.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MHDA **NAME:** FOOD HANDLER TRACKING

DEP/DIV: DHS/HEALTH **YEAR IMPLEMENTED:** 1987

County ordinances 124 and 152 require that all restaurant food handlers study and pass a written exam relating to food hygiene. These exams are usually given twice each month throughout the year. A food handler card (certificate) is issued to each individual who satisfactorily completes the exam.

The food Handler Tracking system was developed to provide an automated system to maintain information on these individuals.

COMPLETELY SATISFIED. The client would like access to history information.

SYSTEM: MHHP **NAME:** HEALTH INFORMATION SYSTEM

DEP/DIV: DHS/HEALTH **YEAR IMPLEMENTED:** 1989

The new Health Information System (HIS) completely replaced and fully integrated several older subsystems, including Membership Management and CHSD Service Statistics. The new Health Information System provides major advantages over these older subsystems including: Automated patient flow, automated patient ledgers, electronic and manual billing to all third parties, a cash registry and handling system, a computerized claims payment system, and a "capitation" tracking system.

VERY SATISFIED. More work is scheduled and the system needs an interface to DHR in Salem.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MHDA **NAME:** FOOD HANDLER TRACKING

DEP/DIV: DHS/HEALTH **YEAR IMPLEMENTED:** 1987

County ordinances 124 and 152 require that all restaurant food handlers study and pass a written exam relating to food hygiene. These exams are usually given twice each month throughout the year. A food handler card (certificate) is issued to each individual who satisfactorily completes the exam.

The food Handler Tracking system was developed to provide an automated system to maintain information on these individuals.

COMPLETELY SATISFIED. The client would like access to history information.

SYSTEM: MHHP **NAME:** HEALTH INFORMATION SYSTEM

DEP/DIV: DHS/HEALTH **YEAR IMPLEMENTED:** 1989

The new Health Information System (HIS) completely replaced and fully integrated several older subsystems, including Membership Management and CHSD Service Statistics. The new Health Information System provides major advantages over these older subsystems including: Automated patient flow, automated patient ledgers, electronic and manual billing to all third parties, a cash registry and handling system, a computerized claims payment system, and a "capitation" tracking system.

VERY SATISFIED. More work is scheduled and the system needs an interface to DHR in Salem.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MJCA **NAME:** CIVIL PROCESS

DEP/DIV: SHERIFF/SERVICES **YEAR IMPLEMENTED:** 1988

The Automated civil process system is comprised of two subsystems: The Civil Process System and the Civil Commitment System.

The Civil Process portion is an online service/process tracking system. Information captured consists of plaintiff, defendant(s), types of processes to be served, address where defendant is to be served, date/time of service, etc. The system also keeps track of daily deputy statistics such as total miles driven, total papers served and returned, hours spent with a levy, waiting, or working in Civil Commitment.

The Civil Commitment Subsystem captures information pertaining to involuntary commitments to County mental health facilities and creates reports of the online queries (such as query by name, facility, types of results, etc.) as well as monthly statistical reports.

VERY SATISFIED. (No additional comment by client.)

SYSTEM: MJCL **NAME:** ALARM ORDINANCE

DEP/DIV: SHERIFF/ALARM **YEAR IMPLEMENTED:** 1989

The Alarm Ordinance System assists the Sheriff's Office to:

1. Register new burglary and robbery alarms and their owners.
2. Renew those permits annually.
3. Monitor all alarm incidents to reduce the number of false alarms.

SATISFIED. Phase I of the system was just completed. Alarm incident tracking is now in design.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MJCT **NAME:** RECORDS MANAGEMENT

DEP/DIV: SHERIFF/LAW ENFORCEMENT **YEAR IMPLEMENTED:** 1987

SRMS is an incident-information tracking system. The incident number (or file number) is the basic unit around which data is collected. When an officer is dispatched by BOEC (Bureau of Emergency Communications) to an incident, the officer radios the MCSO records personnel to have an incident number assigned. Records will enter the incident number, officer BPST number, incident location, description and report date and time into SRMS. All other incident information is entered by records at the time the officer's written report is received. This could include name information, arrest, and offense data. Also kept on SRMS is assignment and complaint information entered by Operations & Analysis.

VERY SATISFIED. The system needs to be integrated with other systems (JAWS for instance).

SYSTEM: MJCW **NAME:** WARRANT SYSTEM

DEP/DIV: SHERIFF/CORRECTIONS **YEAR IMPLEMENTED:** 1981

The Warrants System is an on-line/ADABAS system that stores and retrieves wanted person and warrant information to assist the Division of Public Safety process criminal warrants.

The system uses remote terminals to make warrant information available to authorized users. Information can be entered and updated on-line. Warrant Service Cards and Notification of Arrest Letters are generated automatically. Monthly statistics are generated to create management information.

MARGINALLY DISSATISFIED. The system needs to be integrated with other criminal justice systems and is currently being redesigned under the Sheriff's Integration Project.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MJDA **NAME:** POPULATION MANAGEMENT

DEP/DIV: SHERIFF/CORRECTIONS **YEAR IMPLEMENTED:** 1981

The Corrections Population Management System (CPMS) provides automated system support to the Division of Corrections for:

Population control, booking, recognizance classification and retrieval, inmate tracking, events scheduling, management reporting and release evaluation.

MARGINALLY SATISFIED. The system needs to be interfaced with other criminal justice systems (JAWS for example).

SYSTEM: MJFW **NAME:** PROMIS

DEP/DIV: DISTRICT ATTORNEY **YEAR IMPLEMENTED:** 1989

PROMIS is a complete system to assist in performing the operational functions of a criminal justice agency. It includes software to permit on-line entry, updating, and retrieval, so that such items as arrests, cases, defendants, and witnesses can be tracked. It produces printed outputs, such as calendars, forms and reports, subpoenas and statistical reports. In addition, the system provides maintenance-oriented functions, such as historical purging of records and logging for recovery purposes.

MARGINALLY DISSATISFIED. No ad hoc reporting or interface with other criminal justice agencies is available.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MJKA **NAME:** JUVENILE JUSTICE

DEP/DIV: DHS/JUVENILE **YEAR IMPLEMENTED:** 1982

The Tri-County Juvenile Information System (TJIS) was developed by a committee comprised of counselors, detention personnel, records personnel, and administrators from Multnomah, Washington, and Clackamas Counties in the State of Oregon. These three adjoining counties, in the metropolitan area of Portland, Oregon were keenly aware that automation of certain juvenile administrative records would provide invaluable assistance to counselors and administrators during a time of ever-increasing case loads and stretched-to-the-limit budgets.

DISSATISFIED. The system needs to integrate with word processing and generate more ad hoc reports.

SYSTEM: MJME **NAME:** MEDICAL EXAMINER

DEP/DIV: DJS/MEDICAL EXAMINER **YEAR IMPLEMENTED:** 1989

The Death Investigation system was developed to provide statistical reporting on persons who have died in Multnomah County. Reports are provided semi-annually and annually.

MARGINALLY DISSATISFIED. The system is not advanced enough to meet client needs and additional reports are needed.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MJPF **NAME:** PROBATION FEE

DEP/DIV: DJS/PROBATION **YEAR IMPLEMENTED:** 1983

Fees are collected from probationers on Multnomah County supervised probation. The system tracks payments until the case is purged from the system.

The Office of County Management, Financial Section, acts as the collection agent.

FAIRLY SATISFIED. The client comments that the system costs more to run than it collects in fees.

SYSTEM: MJTS **NAME:** TIMEKEEPING AND REPORTING

DEP/DIV: SHERIFF/ADMIN **YEAR IMPLEMENTED:** 1989

The Sheriff's Office Time and Reporting System (SOTARS) serves three main functions:

1. The roster maintenance portion is comprised of building and maintaining master rosters of all employees for a given shift within department and section.

2. The time reporting portion keeps track of the individual employee's time card data. It provides the ability to query an employee's time card data and to update it if changes are needed.

3. The batch reporting portion of the system includes printed reports of the online queries (such as master roster, daily work schedule, alpha roster, and time card query) as well as the scheduled time keeping reports.

VERY SATISFIED. A short list of improvements will be implemented soon.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MOBB **NAME:** PAYROLL/PERSONNEL WITH POSITION CONTROL

DEP/DIV: DGS/PAYROLL **YEAR IMPLEMENTED:** 1982

Multnomah County's Payroll/Personnel system utilizes computer processing to calculate gross and net pay and to produce payroll warrants (checks) or deposit advices of direct deposits for employees. Necessary accounting entries are automatically produced each payroll cycle to record payroll in the appropriate County ledgers. Reports and files are created for basic payroll reports as well as third-party reports and vendor tapes.

SATISFIED. The client is satisfied with the system. They anticipate doing distributed online payroll after the first of the year, but they do not anticipate any major modifications to the system.

SYSTEM: MOBL **NAME:** LGFS - LOCAL GOVERNMENT FINANCIAL SYSTEMS
GENERAL LEDGER - ACCOUNTS PAYABLE - BUDGET

DEP/DIV: DGS/FINANCE **YEAR IMPLEMENTED:** 1985

General Ledger/Accounts Payable system are used to accurately record the expenses of the County in the proper fiscal period while charging the appropriate fund, agency, organization, and to format the information into reports as needed by the users. The ledger also maintains an accurate accounting.

MARGINALLY SATISFIED. The clients for both General Ledger and Accounts Payable are marginally satisfied with the system. They receive a new version of the system once a year giving them new and expanded capabilities. We develop new reports on an on-going basis.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MOBP **NAME:** FIXED ASSETS

DEP/DIV: DGS/FINANCE **YEAR IMPLEMENTED:** 1987

The Fixed Assets System provides an inventory of the County's assets by organization and/or location. The system records asset acquisition, betterment, transfer, and disposition transactions to provide for the managing and reporting of equipment, vehicles, buildings, land, land improvements, park sites, and construction work in progress.

COMPLETELY SATISFIED. The client is completely satisfied with the system and anticipates no changes.

SYSTEM: MODA **NAME:** BUDGET PREPARATION

DEP/DIV: DGS/BUDGET **YEAR IMPLEMENTED:** 1987

Record and accumulate financial information to produce printed budget documents and feed initial budget load into LGFS.

MARGINALLY SATISFIED. The client is marginally satisfied with the system. The portion of the system in operation functions very well and the client is completely satisfied with that. They are in need of additional system support. They need the revenue side expanded and additional reports.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MOSA **NAME:** INVENTORY/PURCHASING

DEP/DIV: DGS/PURCHASING **YEAR IMPLEMENTED:** 1984

The inventory purchasing system was purchased in 1982 to assist the purchasing division in the efficient procurement of goods and services and the management of the central stores inventory. The Walker PO (purchase order) and MM (material management) are two separate but integrated products that provides online real time assistance to the users of the system.

DISSATISFIED. The client has a need for an integrated system with the accounts payable system. In addition, they are in need of a number of management reports and a better method of tracking all phases of the bid process. They are currently investigating the possibility of purchasing the LGFS Extended Purchasing and Inventory system.

SYSTEM: MOSC **NAME:** CONTRACT INFORMATION SYSTEM

DEP/DIV: DGS/ **YEAR IMPLEMENTED:** 1987

The Contract Information System tracks executed contracts (encumbrances) by type, contractor, contract number, agency and bid.

MARGINALLY SATISFIED. The system is marginally satisfactory. The client could use additional management reports and information about actual expenditures against encumbrances.

ISD SYSTEM SURVEY RESULTS

SYSTEM: MOSE **NAME:** BOARD OF EQUALIZATION

DEP/DIV: DGS/BOARD OF EQUALIZATION **YEAR IMPLEMENTED:** 1987

The Board of Equalization (BOE) system allows data on BOE petitions to be entered on an automated system in order to update petitions, schedule hearings, create daily dockets and reports. The system generates weekly reports. Assessment and Taxation has access to the system for inquiry.

COMPLETELY SATISFIED. The client is completely satisfied with the system, but would like some minor enhancements.

SYSTEM: MOTI **NAME:** TELEPHONE INVENTORY

DEP/DIV: DGS/TELECOMMUNICATIONS **YEAR IMPLEMENTED:** 1984

The Telephone Inventory System enables the client to record, store, change, and access important details regarding telephone inventory, as well as produce a variety of reports, including a monthly billing to system users.

COMPLETELY SATISFIED. The client is completely satisfied with this system and anticipates no changes.

No System Opportunity Assessments were submitted from the Department of Justice Services for next fiscal year.

No System Opportunity Assessments were submitted from the Sheriff's Office for next fiscal year. It was the decision of the Department that no new applications should be undertaken until some of the work in progress is complete.

DATE SUBMITTED 3/5/90

(For Clerk's Use)
Meeting Date MAR 13 1990
Agenda No. Reg. #3

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Briefing on Children's Day Treatment

Informal Only* 3/13/90 (Date) Formal Only _____ (Date)

DEPARTMENT Human Services DIVISION Social Services

CONTACT Gary Smith or Jim Edmondson TELEPHONE 248-3691 (Gary) or 248-3999 (Jim)

*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Gary Smith; Bill Carey, CSD; Pam Patton, Morrison Ctr.

BRIEF SUMMARY Should include other alternatives explored, if applicable, and clear statement of rationale for the action requested.

Social Services Division proposes to enter into an intergovernmental agreement with Children's Services Division in order to fund two day treatment centers for severely abused children, one currently supported by County General Fund through contract with Morrison Center and a new program to be sited in N/NE. Through use of Title XIX, no new funds are necessary to serve twice the number of children.

(IF ADDITIONAL SPACE IS NEEDED, PLEASE USE REVERSE SIDE)

ACTION REQUESTED:

☒ INFORMATION ONLY ☐ PRELIMINARY APPROVAL ☐ POLICY DIRECTION ☐ APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 15 minutes

IMPACT: No fiscal impact; requires cooperative action and intergovernmental agreement with Children's Services Division. This will be presented for final approval when the agreement, now in draft form, is finalized.

PERSONNEL

☐ FISCAL/BUDGETARY

☐ General Fund

Other _____

BOARD OF COUNTY COMMISSIONERS
1990 MAR -7 AM 9:27
MULTNOMAH COUNTY OREGON

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: Dave Bissy (DC)

BUDGET / PERSONNEL _____

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) _____

OTHER _____
(Purchasing, Facilities Management, etc.)

NOTE: If requesting unanimous consent, state situation requiring emergency action on back.

1984

Multnomah County MED and Children's Service Division
JOINT PROPOSAL TO FUND DAY TREATMENT SERVICES FOR CHILDREN
Combining MED County General Funds with CSD Medicaid Funds
Through Intergovernmental Agreement

Background. CSD funds one day treatment program for ten severely emotionally disturbed children, ages six and under, in Multnomah County at $166,100 a year. This amount is a lower rate of funding than most other CSD funded DARTS programs. The County Commissioners funded a second day treatment program, also for ten children, for $202,800 a year, which is 89% of CSD's model rate for DARTS programs. The subcontractor, Morrison Center, has requested that County funds be used to enhance both existing programs to bring them up to 100% of the DARTS model rate.

In addition to the current twenty day treatment slots in the County, a need for treatment for ten minority children has been identified in the N/NE part of the city.

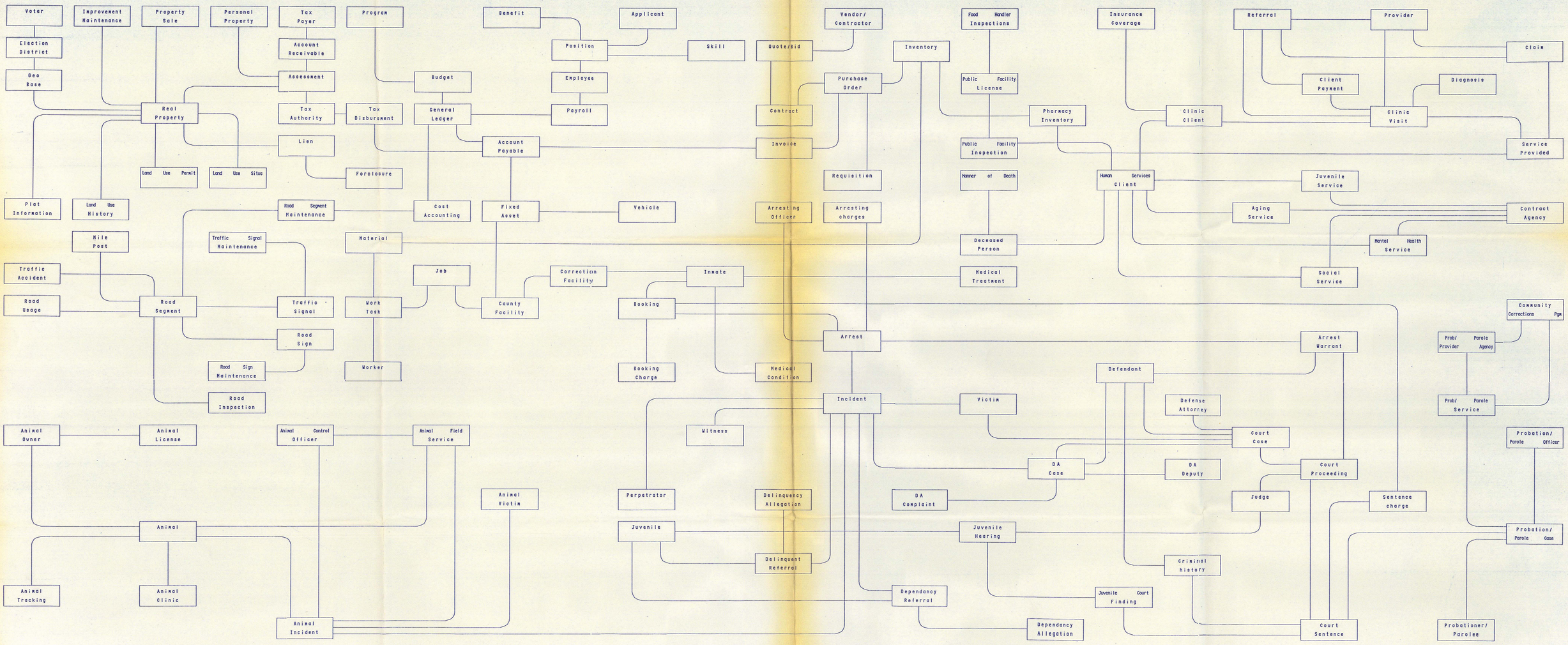
Proposed Funding Strategy. CSD funds its DARTS programs through use of State GF as match for Title XIX dollars. If Multnomah County transferred County GF to CSD to be used as Title XIX match, the purchasing power of local dollars would be magnified by a factor of 2.7. With the existing level of County funding for day treatment, such a transfer could accomplish the following:

-bring both DARTS programs in the County up to the model rate; and
-fully fund (at 100% of model rate) a new third program in N/NE Portland.

Benefit to the County. Currently, the County pays $202,800 in cash support of one center. This equals only 89% of CSD's current model rate. Both existing programs currenty have a foster parent support and recruitment component, but this is funded by a private foundation grant that will run out later this year.

Using transferred County funds as General Fund match for DARTS services, three fully funded day treatment programs could be purchased, instead of two which are funded at less than the model rate. All three sites would include foster parent support components. This fund transfer would be slightly less than the current County expenditure, leaving a small savings which MED would hold in reserve to pay for services to any non-Title XIX-eligible children referred for service.

Benefit to CSD. CSD would fund the match for most or all of Site #1, and fund 3 FTE and the foster parent component. In return, however, they would be able to provide three day treatment centers instead of one. All contracts would be administered by them, allowing for consistency in monitoring across programs. The agreement would serve as a demonstration project for similar county/state cooperative agreements for maximizing funds, which would allow CSD a considerable expansion of their capacity to serve children statewide. The agreement would increase the number of DARTS programs at the model rate funding level. It would provide an opportunity to demonstrate enhanced services through a new funding mix, including additional federal funds to support three additional FTE and foster parent support and recruitment.



Entity Model

October 13, 1989 10:58:42

MULTNOMAH COUNTY DATA MODEL

INFORMATION SERVICES DIVISION