



## **Department of County Management**

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Date: September 11<sup>th</sup>, 2014  
To: Multnomah Board of County Commissioners  
From: Budget Office  
Re: Budget Note Process and Guidelines

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### **Summary**

In response to a FY 2015 budget note request, the Budget Office has developed recommendations for budget note guidelines and a vetting process for the Board's consideration. Recommendations were developed with a goal of preserving the integrity of budget notes by having notes fulfill their intent, while avoiding overtaxing departments with significant reprioritization of existing work to fulfill budget note requirements.

### **Background**

As part of the budget process, County Commissioners can propose budget notes during any public worksession. Budget notes are currently used by the Board to provide input and direction on issues that arise during the budget process. The County has no specific guidelines set by Board policy or administrative procedure; however, the Budget Director's message describes budget notes as follows: "Budget notes document policy discussion and decisions made by the Board of County Commissioners during the budget worksessions and provide direction to departments in achieving the Board's policy goals during the fiscal year".<sup>1</sup> Budget notes often request that departments report back to the Board with a budget-related policy issue briefing or report. Proposed budget notes may be more fully developed by the Budget Office, Board staff and/or departments as necessary, and are shared with the Board at the beginning of each budget worksession week. The final version of the budget notes are included in the budget adoption resolution and the official budget document.

The FY 2015 budget notes included a request for a briefing on Multnomah County's budget note process and guidelines. Specifically, the note requested:

<sup>1</sup> FY 2015 Multnomah County Adopted Budget, p.31

- A review of the FY 2015 budget notes to identify the impacts of budget note requests, including the resources necessary to meet the requests, and a proposed timeline;
- Proposed guidelines for the submission of future budget notes; and
- A proposed vetting process.

### **Impacts of FY 2015 Budget Notes**

In FY 2015, the Board submitted nine budget notes requesting 23 associated department briefings (see Attachment A). In the past five years, the Board typically submitted around seven budget notes each year requesting an average of seven associated department briefings. The high number of briefings requested this year will require significant evaluation and analyses from departments.

When planning responses to the FY 2015 briefings, departments and the Department of County Management identified resources and potential timelines (See Attachment B). Budget note briefings will occupy nearly half of available briefing dates between now and April, and an additional two briefings are scheduled during regular board meetings. In total, budget note briefings will take approximately 22 hours of briefing time. Approximately half of the briefings require preparation by more than one department, and in total departments will participate in briefing preparation 36 times. The Health Department has the most briefings (9), followed by Department of County Human Services (8) and the Sheriff's Office (5).

### **Proposed Guidelines and Vetting Process Development**

The budget note on budget notes directed the Budget Office to propose note guidelines and a vetting process. In order to develop recommendations, the Budget Office researched the use of budget notes in other local governments, researched best practices, and examined Multnomah County budget notes from previous years.

Many local governments choose not to use budget notes at all. Neither Washington nor Clackamas Counties use budget notes. The City of Portland does use budget notes and theirs are similar in number to Multnomah County; however, their budget notes typically only request four to eight briefings.

Given the sparse use of budget notes, the fact that our research found a lack of readily available documentation on budget note policy is not surprising. There is variation in use among the local governments that do make use of budget notes, but the most typical purposes are to specify uses of contingency funds or to clarify budget items. The Government Finance Officers Association (GFOA), commonly a source for budgetary policy best practices, offers no formal guidance. Oregon's Legislative Fiscal Office (LFO), however, does provide guidelines for budget notes that may be applicable to Multnomah County.

LFO provides the following definition for budget notes: "A budget note is a formal directive...expressing legislative intent for a particular budget issue. A budget note is technical in nature, directing an agency to take administrative and managerial action relating to the agency's execution of its...budget. A budget

note is of limited scope, not intended to circumvent, supplant, or replace other substantive or policy measures or law.”<sup>2</sup>

Multnomah County budget notes have historically been beyond the scope of LFO’s definition and guidelines, which limit budget notes to issues and items specifically related to the execution of the budget. Multnomah County budget notes generally serve four different purposes (see figure 1):

**Purpose 1: Contingency Funds Explanation:** To set aside and indicate intent of contingency funds.

**Purpose 2: More Information Before Finalizing:** To address an issue the Board wishes to incorporate in the upcoming fiscal year budget or for which they may desire to set aside contingency, but there is insufficient time and information to determine the precise amount or address the issue adequately (for example, if the County is anticipating cuts to state funding but the Board needs more information before deciding how to proceed).

**Purpose 3: Policy or Rule Exception:** To give a department permission to do something that is an exception to a budget-related policy or rule (for example, in FY 2011 the Sheriff’s Office was given permission to overfill budgeted Deputy positions).

**Purpose 4: Budget-related Policy Issue:** To identify a budget-related policy issue for future exploration and action related to a future year’s budget (typically does not have money attached).

Over the five years previous to the FY 2015 budget process, all budget notes fit into one of the four categories (see Figure 1). The categories are not necessarily mutually exclusive, and categorization is open to some degree of interpretation; we assigned each note to the one category it best represented.

**Figure 1: Budget Note Categories – Historical Analysis**

	<b>Purpose 1</b>	<b>Purpose 2</b>	<b>Purpose 3</b>	<b>Purpose 4</b>		
FY	Contingency Funds	More Information	Policy or Rule Exception	Budget-related Policy Issue	Other	# of budget notes
2015	3	3		8	4	9 (18 issues) <sup>3</sup>
2014	3	2		2		7
2013	4	3		1		8
2012	2	3		2		7
2011	6	1	1	3		11 <sup>4</sup>
2010		3		3		6

<sup>2</sup> <https://www.oregonlegislature.gov/lfo/Documents/2007-3%20Budget%20Note.pdf>

<sup>3</sup> Actual number of budget notes is 9, but the 8<sup>th</sup> budget note included 9 separate issues bundled into one note labeled “Briefings to the board”. For the purposes of this analysis, each discrete briefing topic was considered a separate budget note.

<sup>4</sup> Actual number of budget notes is 12. One budget note is a list of deadlines for briefings related to contingency items that already have their own budget notes, so is duplicative for the purposes of this analysis.

Viewing previous budget notes through one consistent lens illustrates how FY 2015 represented a departure from past practices. Budget-related policy issues dominated more than in any previous year, and four budget notes fall outside of the traditionally used categories. Figure 2 provides a complete listing of FY 2015 budget notes and their categories.

**Figure 2: FY 2015 Budget Note Categorizations\***

<b>Briefing Numbers</b>	<b>Budget Note Title</b>	<b>Category</b>
3	Feasibility Assessment: Mental Health Jail Diversion	Contingency
5	Sandy River Delta Outreach and Cleanup	Contingency
6-8	Addressing Socio-Economic Disparities	Contingency
1	Health Department: Alternative Payment Methods	More info
17	DCHS - Recommendation of adequate ongoing funding for the Homeless Youth System	More info
19	DCHS - Trends in mental health both before and after the implementation of the ACA and expansion of Medicaid	More info
16	DCHS - Work with other departments to conduct an inventory of programs that have housing as a component	Other
20	District Attorney - Restitution Recovery Pilot project	Other
21	Countywide - Discussion of succession planning across the county	Other
22	Countywide - Grant writing efforts in Multnomah County	Other
12-15	Health Department - Quarterly reports on Corrections Health Mental Health Pilot Program	Policy
4	Update on Fleet Services	Policy
23	Budget Note Process and Guidelines	Policy
11	Health Department - Outcome measures for early childhood services	Policy
2	Medical Examiner	Policy
9	Pedestrian Safety	Policy
10	Health Department - Health care platform	Policy
18	DCHS - Early Learning Hub	Policy

\* Note: As mentioned above, categories are not mutually exclusive. For example, several of the “contingency” category items in this table also include a strong policy component. Briefing numbers can be cross-referenced with attachments A and B to find further information about the specific budget notes that requested the briefings.

The “other” category budget notes typically requested additional information on broad topics not directly related to the budget and instead focused on County and departmental operations, or information with no plan for future action. There are no formal guidelines for Multnomah County budget notes, and these are not outside the scope of budget notes, which are a tool available to the Board to use as they see fit. The information requested is important; these briefings will provide knowledge that will assist the Board in policy decisions. However, the outliers do raise the question of the intended purpose of budget notes, a question that is worth further discussion.

## Proposed Guidelines

The goal of any proposed alternatives to the budget note process or formalized guidelines is to preserve the integrity of budget notes by having them fulfill their intent, while also avoiding overtaxing departments and requiring them to reprioritize existing workloads in order to fulfill budget note requirements. Keeping this in mind, we have developed three proposed criteria that incorporate the most frequently used categories of budget notes.

1. Budget notes should relate to specific items in the budget for the upcoming fiscal year or future years.
2. Budget notes should take into account impacts on department workloads, including the cumulative impact of budget note requests and when a request does not fund additional analytic capability that may be required.
3. Budget notes should address one of four issues:
  - a. **Contingency Funds Explanation:** To set aside and indicate intent of contingency funds;
  - b. **More Information Before Finalizing:** To address an issue the Board wishes to incorporate in the upcoming fiscal year budget or for which they may desire to set aside contingency, but there is insufficient time and information to determine the amount or address the issue;
  - c. **Policy or Rule Exception:** To give a department permission to do something that is an exception to a budget-related policy or rule; or
  - d. **Budget-Related Policy Issue:** To identify a budget-related policy issue for future exploration and action related to a future year's budget (typically does not have money attached).

## Vetting and Proposal Process for Budget Notes

The budget note on budget notes directed the Budget Office to identify a vetting process. Our proposed process for FY 2016 is very similar to the current process, albeit more formalized. This vetting process was designed with two goals in mind: 1) to increase communication and awareness among all parties for budget note requests and impacts, and 2) to allow sufficient time to develop budget notes and related information:

1. Budget note policy and guidelines will be reviewed in the first budget worksession.
2. Commissioners propose notes as is currently done.
3. The Budget Office, in conjunction with Board staff and departments, will document estimated workload impacts, applicable deadlines, any estimated costs, responsible parties, involved departments, and work product requested (e.g. report or briefing), etc.
4. Each proposed budget note will be reviewed by the Budget Office and Chief Operations Officer (COO) to ensure that all necessary ancillary information (e.g. workload impacts, deadlines, etc) is provided.
5. Budget notes, along with any necessary related information, will be presented to the Board as needed throughout the budget worksessions.

6. The final day for submission of budget notes will be one week before the budget adoption date to ensure sufficient time for the necessary information to be gathered (Briefings on any subject could still be requested through the usual channels).
7. Budget notes are adopted as part of budget adoption resolution.

It should be emphasized that this process is not intended to limit requests for information, but rather to refine which information requests are made during budget worksessions and to ensure consistency and communication throughout the budget note process.

## **Options for the Board**

The Board has several options for budget notes:

### Option 1 – Adopt guidelines and vetting process for future budget notes as recommended by the Budget Office

The Budget Office has developed the guidelines and vetting process in this memo by researching budget notes in other local governments and analyzing the historical purpose of budget notes at Multnomah County.

### Option 2 – Limit budget notes to identifying and explaining dollar amounts

LFO's guidance specifies that budget notes should be related to specific budget items. For example, the Board could choose to limit budget notes to items indicating contingency earmarks.

### Option 3 – Discontinue budget notes

There is no legal requirement for budget notes, and neighboring jurisdictions Clackamas County and Washington County do not have budget notes. If budget notes are determined not to be useful, they can be discontinued.

### Option 4 – Keep process as is

The budget note on budget notes requested discussion of the current budget note process and recommendations for budget note guidelines and a vetting process. However, the Board may choose not to act on these recommendations.

### Option 5 – Adopt guidelines and vetting process as suggested by the Board

Suggestions from the Board on improvements to this process are welcome. Additional options could include refinement of the proposed criteria and vetting process, or further formalization of the budget note process (e.g. a budget note request form to document the request and details).

**ATTACHMENT A**  
**FY 2015 Adopted Budget Notes**

## FY 2015 Budget Notes

ADOPTED: May 29, 2014

*Bold items indicate request for a presentation to the board.*

Briefing Numbers	Budget Note Title	Budget Note Description
1	Health Department: Alternative Payment Methods	<p>The Affordable Care Act and State health transformation are changing the way Health Department clinics will be paid for services, away from a fee-for-service model and towards “Alternative Payment Methodology” (APM), which will provide a capitated rate for Medicaid patients assigned to Multnomah County clinics. The County expects to begin a pilot of APM soon, but the FY 2015 budget does not reflect payment methodology changes.</p> <p>The Board of Commissioners would like the Health Department to <b>report back to the Board</b> on progress with APM, including:</p> <ol style="list-style-type: none"><li>1. Timing of the County’s participation in an APM pilot</li><li>2. Whether the compensation received under APM covers the cost of providing care to patients</li><li>3. Any trends in treatment, outcomes, or expenses, if applicable.</li></ol>
2	Medical Examiner (Wendt)	<p>Counties and the State of Oregon share authority and responsibility for staffing, supervision, operations, and technical direction of the County Medical Examiner’s (ME) Office. This unique structure presents challenges for staffing and supervision.</p> <p>We direct the Health Department and District Attorney to jointly <b>conduct a review</b> of the staffing and management structure of the County Medical Examiner’s Office. The review should recommend the appropriate level of supervision for the County ME office.</p>
3	Feasibility Assessment: Mental Health Jail Diversion	<p>The Board remains concerned about the number of people with mental health issues being housed in the county’s jails. It remains a questionable and</p>



	(Shiprack)	<p>expensive way to address the mentally ill who come in contact with the public safety system. Jail diversion programs focused on stabilization, integration of health care, and the public safety system's ability to direct people with mental illness away from jails and into appropriate treatment have been successful. The Chair's proposed pilot programs for jail diversion in this year's budget are commendable. In places like Bexar County, Texas, thousands of people have been diverted from jail into more appropriate treatment facilities, saving millions of dollars annually in jail and emergency room costs.</p> <p>The Board will set aside \$100,000 in General Fund Contingency to evaluate current efforts and further investigate opportunities for Mental Health Jail Diversion efforts in Multnomah County.</p> <p>By December 31, 2014, the Local Public Safety Coordinating Council (LPSCC) will <b>provide the Board with an assessment</b> of the feasibility of increasing jail diversion programs in Multnomah County. LPSCC will coordinate with a facilitator to convene stakeholders and produce the assessment, which should include:</p> <ul style="list-style-type: none"> <li>• evaluation of current jail diversion pilot programs;</li> <li>• findings and recommendations from successful jail diversion programs in other municipalities, including elements central to a successful jail diversion program;</li> <li>• an estimate of the number of people currently in Multnomah County jails or on community supervision in need of such services;</li> <li>• existing community capacity to implement and sustain a holistic jail diversion program, including identification of any new infrastructure that would be required by government or non-government service providers;</li> <li>• recommendations for the size and annual caseload for the jail diversion program and programmatic components;</li> <li>• an estimate for the annual costs for running a</li> </ul>
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		<p>jail diversion program, including who might incur these costs;</p> <ul style="list-style-type: none"> <li>• estimated savings from reduced use of the jails; and</li> <li>• grant opportunities to improve services for clients in the public safety system experiencing mental illness.</li> </ul>
4	Update on Fleet Services (McKeel)	<p>The Department of County Assets (DCA) will <b>provide a briefing to the board</b> on the Fleet division of DCA. The briefing will include a general overview of key Fleet activities, issues and long-range planning, including:</p> <ul style="list-style-type: none"> <li>• an update on the pilot partnership with the City of Portland for vehicle services, the ongoing negotiations to expand City servicing of County vehicles, and other potential options for vehicle service;</li> <li>• long-range strategic sourcing plans, including efforts to increase the participation of local and women or minority-owned businesses.</li> </ul>
5	Sandy River Delta Outreach and Cleanup (McKeel)	<p>The Sandy River Delta is a destination recreation area for the Multnomah County community. Hikers, horseback riders, families, and nature enthusiasts regular enjoy what is known as "1000 Acres." Currently, the area is a public health hazard and has experienced uncharacteristically high rates of crimes against people and property. The area is rural and those who camp in the area due to homelessness are far removed from the services available to similar populations who inhabit urban areas in the city centers.</p> <p>This budget note sets aside \$60,000 in General Fund Contingency dedicated to the restoration and cleanup of the Sandy River Delta and the service needs of the homeless population currently living there. The funding is intended to bring Department of County Human Services (DCHS) and their community partners along with the Multnomah County Sheriff's Office (MCSO) together to achieve two primary goals.</p> <ol style="list-style-type: none"> <li>1. Establish stronger outreach relationships with the</li> </ol>

		<p>homeless populations in the area in order to link them into the service continuum to find a path into a home.</p> <p>2. Conduct cleanup efforts in order to remove the significant public health and environmental hazards in the recreational site to include the removal of trash piles, human waste, animal carcasses harvested by campers, abandoned homestead sites, and discarded supplies.</p> <p>This effort will bring dedicated professionals into the area to link individuals with services and improve the recreational value of the delta and the health of our waterways.</p> <p>This note calls for operational plans, developed in conjunction between DCHS and MCSO, <b>to be reported to the Board</b> in order to request the set-aside funds. The \$60,000 is intended to provide those departments with the ability to conduct multiple cleanups and outreach efforts throughout the year based on need.</p>
6, 7, 8	Addressing Socio-Economic Disparities (Smith)	<p>Since 2010, the Coalition of Communities of Color has published several reports documenting disparities in a wide range of outcomes and services experienced by communities of color living in Multnomah County. The Board of Commissioners is placing \$1.0 million in General Fund Contingency for programs to eradicate socio-economic disparities in Multnomah County. The Board is interested in programs following the template of the federal Promise Neighborhoods Initiative, including efforts to improve the quality of life for youth experiencing generational poverty and discrimination. The Board is seeking to develop evidence-based solutions tailored to the cultural specifics of each community through a collaborative infrastructure that promotes long-term impact and positive results.</p>

		<p>A multi-departmental team led by the Department of County Human Services and including the Department of Community Justice, the Office of Diversity and Equity, along with community stakeholders, and philanthropic community shall work together to plan how this funding will be used to address socio-economic disparities, inclusive of school retention, completion and reduction in school suspensions and expulsion. This team will <b>report back to the Board by August 31, 2014</b>, with a program proposal that includes:</p> <ul style="list-style-type: none"> <li>• Identification of how County resources will be used and leveraged to eliminate disparities in services experienced within the community;</li> <li>• Descriptions of the programs that will be implemented with this funding;</li> <li>• Which communities the programs will be designed to serve;</li> <li>• How many people can be served with the funding;</li> <li>• The programs' desired outcomes, including performance measures and targets that directly respond to the "Unsettling Profile" reports;</li> <li>• Development of successful training and consultancy methods that establish competencies to support successful families and youth residing in Multnomah County.</li> </ul> <p>Funding will be released by the Board upon approval of the program proposal. After program implementation begins, the team will report back to the Board on program progress including successes, challenges, and/or implementation barriers. <b>One report should occur by December 31, 2014 and another by March 31, 2015.</b></p>
9	Pedestrian Safety (Smith)	<p>As the Public Health Authority for Multnomah County, it is incumbent upon our Health Department to frequently evaluate the status of pedestrian safety and to provide policy recommendations to the Board of Commissioners that will lead to a reduction in pedestrian fatalities. Community livability and the overall wellness of Multnomah County residents is a</p>

		<p>priority every County Commissioner takes seriously, and wishes to apply equitably to the whole of Multnomah County.</p> <p>Therefore, the Board directs the Multnomah County Health Department (MCHD) and the Department of Community Services (DCS) to jointly accomplish the following -</p> <ul style="list-style-type: none"> <li>• Develop a board briefing summarizing data and policy initiatives relevant to pedestrian safety, including work already in progress by coalitions in which Multnomah County already participates.</li> <li>• Identify funds from the state and federal level that can be utilized for pedestrian safety when it is identified as a public health issue.</li> </ul> <p>The MCHD and DCS will jointly <b>report back to the Board of Commissioners by the end of calendar year 2014.</b></p>
10 to 22	Briefings to the Board	<p>In the course of the budget work sessions, commissioners requested more information or future briefings from departments in a variety of topic areas. The briefings listed in this budget note shall be presented to the Board during FY 2015:</p> <ul style="list-style-type: none"> <li>• <u>Health Department</u>: a <b>presentation</b> that describes the Health Department's fundamental health care responsibilities and defines a "platform" for health care in Multnomah County. The presentation should discuss funding levels and differentiate between "platform" services and services that augment our fundamental responsibilities. The presentation should include discussion of the performance measures, client populations served, and system partners. (Shiprack)</li> <li>• <u>Health Department</u>: a <b>report to the board</b> on potential cross-jurisdictional outcome measures for Early Childhood Services. The board is interested in how we can measure success of the Early Childhood Services</li> </ul>

		<p>program outside of the health realm, in areas such as school or juvenile justice. (Shiprack)</p> <ul style="list-style-type: none"> <li>• <u>Health Department:</u> The Multnomah County Sheriff's Office and the Health Department Corrections Health Division shall <b>provide quarterly reports to the Board</b> on the Corrections Health Mental Health Pilot Program outcomes and budget impact of this program, including the use of overtime by the Sheriff's Office and the length time of spent on Suicide Watch. (Program Offer 40059).(Wendt)</li> <li>• <u>DCHS:</u> Work with other county departments to conduct an inventory of programs that have Housing as a component and provide a <b>briefing to the Board by October 2014.</b> (Shiprack)</li> <li>• <u>DCHS:</u> <b>Recommendation</b> of adequate ongoing funding for the Homeless Youth System. Discussion should include a list of current services, funding sources, performance outcomes, and clients served (Shiprack)</li> <li>• <u>DCHS:</u> <b>Briefing</b> on the Early Learning Hub</li> <li>• <u>DCHS:</u> <b>Briefing</b> to the board on trends in mental health both before and after the implementation of the Affordable Care Act and expansion of Medicaid, including number of visits, percent of patients insured, and other trends in key financial indicators, treatment, or outcomes.</li> <li>• <u>District Attorney:</u> <b>Briefing</b> on the Restitution Recovery Pilot Project, including successes, timing and amounts of state funding, and an update on the restructured program and performance.</li> <li>• <u>Countywide:</u> <b>Discussion</b> of succession planning across the county, including the county's human resource structures and training capacity. (McKeel).</li> <li>• <u>Countywide:</u> The <b>Board will be briefed</b> from departments on grant writing efforts in Multnomah County <b>by October 2014.</b> Led by our Senior Grants Coordinator in the Government Relations department, the briefing should include:</li> </ul>
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		<ul style="list-style-type: none"> <li>○ The approaches and structure of grant writing within each department;</li> <li>○ An examination of the resources county grant writers pursue, including strategy and funding sources;</li> <li>○ Suggestions for efficiencies or increased coordination in Multnomah County's grant writing efforts. (McKeel).</li> </ul>
23	Budget Note Process and Guidelines (Madrigal)	<p>In FY 2015, the County was able to plan for current service levels while making strategic investments. While things are getting better, over the past decade the County has lost critical infrastructure, including analytical and research capacity that will take time to rebuild.</p> <p>During the FY 2015 budget process, there were an unprecedented number of proposed Budget Notes and Board Briefings. The requested evaluations and analyses will require a significant commitment of department resources without adding analytical capacity. As a result, departments will be forced to reprioritize existing workloads in order to comply with Budget Notes.</p> <p>The Board directs the Budget Office to <b>lead a discussion</b> regarding Budget Notes that includes the following:</p> <ul style="list-style-type: none"> <li>● Review the FY 2015 Budget Notes to identify the resources/impact, time commitments, and identified timelines necessary to meet the requests;</li> <li>● propose criteria and guidelines for the submission of future Budget Notes; and run the FY 2015 Adopted Budget Notes through the criteria; and</li> <li>● identify a vetting process for Budget Notes.</li> </ul>

**ATTACHMENT B**

**FY 2015 Budget Note Resource Needs and Proposed  
Timeline**



Dept

Dept

Dept

Deadline

Proposed  
Briefing  
DateEst.  
Time

Presentation Content

Est.  
DifficultyResources Needed  
to Complete

1	Health Department: Alternative Payment Methods	HD			30-Jun-15	13-Jan-15	1 hr	Progress report on timing of County's participation in an Alternating Payment Method (APM) pilot which is expected to begin soon to include: whether the compensation received under APM covers the cost of providing care to patients, any trends in treatment, outcomes, or expenses	Medium	staff time, research
2	Medical Examiner	HD			30-Jun-15	16-Oct-14	1 hr	Review and present the staffing and management structure of County Medical Examiner (CME) along with recommendations for the appropriate level of supervision for the CME office	Medium	staff time, research
3	Feasibility Assessment: Mental Health Jail Diversion	LPSCC			31-Dec-14	2-Dec-14	1 hr	Provide an assessment of the feasibility of increasing jail diversion programs in Multnomah County: LPSCC to coordinate with a facilitator to convene stakeholder groups and produce the assessment, which should include evaluation of current jail diversion pilot programs, findings and recommendations from successful jail diversion programs, estimate of the number of people currently in Multnomah County jails or on community supervision in need of such services, existing community capacity to implement and sustain a holistic jail diversion program, recommendations for size and annual caseload for the program and components, estimates of cost, estimate of savings from reduced use of jails, grant opportunities (details in budget note)	High	staff time, research, work with stakeholders, facilitator, analysis, budgeting, financial planning, grant research
4	Update on Fleet Services	DCA			30-Jun-15	21-Oct-14	1 hr	Briefing to include a general overview of key Fleet activities, issues and long-range planning, including an update on the pilot partnership with the city of Portland for vehicle services, the ongoing negotiations to expand city servicing of county vehicles and other potential options for vehicle service, long-range strategic sourcing plans, including efforts to increase the participation of local and women or minority-owned businesses	Low	planning
5	Sandy River Delta Outreach and Cleanup	DCHS	MCSO		30-Jun-15	6-Nov-14	30 min	Create operational plans to present to the Board (plans needed in order to request set aside \$ from the Board) to achieve stronger outreach relationships with homeless populations in the area and to conduct cleanup efforts in order to remove the significant public health and environmental hazards in the recreational site	Medium	planning, budgeting
6	Addressing Socio-Economic Disparities (Briefing 1 of 3)	DCHS	DCJ	ODE	31-Aug-14	11-Sep-14	1 hr	Program proposal that includes identification of how county resources will be used, descriptions of the programs that will be implemented with the funding, in which communities, how many people will be served, desired outcomes, performance measures and targets, development of successful training and consultancy methods	High	staff time, research, budget, performance measurement, training
7	Addressing Socio-Economic Disparities (Briefing 2 of 3)	DCHS	DCJ	ODE	31-Dec-14	9-Dec-14	1 hr	Progress report on successes, challenges, and/or implementation barriers	Low	staff time, research
8	Addressing Socio-Economic Disparities (Briefing 3 of 3)	DCHS	DCJ	ODE	31-Mar-15	31-Mar-15	1 hr	Progress report on successes, challenges, and/or implementation barriers	Low	staff time, research
9	Pedestrian Safety	HD	DCS		31-Dec-14	4-Nov-14	1 hr	Board briefing summarizing data and policy initiatives relevant to pedestrian safety and work already in progress by coalitions in which Multnomah County already participates; identify funds from state and federal levels that can be utilized for pedestrian safety	Low	staff time, research
10	Briefings to the Board (1 of 13): Health Department - Health care platform	HD			30-Jun-15	2-Dec-14	1 hr	Presentation that describes the Health Department's fundamental health care responsibilities and defines a platform for health care in Multnomah County: covers funding levels and differentiates between platform services and services that augment our fundamental responsibilities, performance measures, client populations served, system partners	Medium	staff time, research
11	Briefings to the Board (2 of 13): Health Department - Outcome measures for early childhood services	HD			30-Jun-15	18-Nov-14	30 min	Report on potential cross-jurisdictional outcome measures for early childhood services: how to measure success outside of the health realm in areas such as schools or juvenile justice	Low	staff time, research

FY2015 Budget Note Briefings

	Budget Note Title	Dept	Dept	Dept	Deadline	Proposed Briefing Date	Est. Time	Presentation Content	Est. Difficulty	Resources Needed to Complete
12	Briefings to the Board (3 of 13): Health Department - Quarterly reports on Corrections Health Mental Health Pilot Program - First Quarter	HD	MCSO		30-Sep-14	23-Sep-14	1 hr	Budget impact and progress on outcomes of Corrections Health Mental Health Pilot Program, including the use of overtime by the Sheriff's Office and the length of time spent on suicide watch	Low	staff time, research
13	Briefings to the Board (4 of 13): Health Department - Quarterly reports on Corrections Health Mental Health Pilot Program - Second Quarter	HD	MCSO		31-Dec-14	9-Dec-14	1 hr	Budget impact and progress on outcomes of Corrections Health Mental Health Pilot Program, including the use of overtime by the Sheriff's Office and the length of time spent on suicide watch	Low	staff time, research
14	Briefings to the Board (5 of 13): Health Department - Quarterly reports on Corrections Health Mental Health Pilot Program - Third Quarter	HD	MCSO		31-Mar-15	31-Mar-15	1 hr	Budget impact and progress on outcomes of Corrections Health Mental Health Pilot Program, including the use of overtime by the Sheriff's Office and the length of time spent on suicide watch	Low	staff time, research
15	Briefings to the Board (6 of 13): Health Department - Quarterly reports on Corrections Health Mental Health Pilot Program - Fourth Quarter	HD	MCSO		30-Jun-15	23-Jun-15	1 hr	Budget impact and progress on outcomes of Corrections Health Mental Health Pilot Program, including the use of overtime by the Sheriff's Office and the length of time spent on suicide watch	Low	staff time, research
16	Briefings to the Board (7 of 13): DCHS - Work with other departments to conduct an inventory of programs that have housing as a component	DCHS	Auditor's office		9-31-14	28-Oct-14	1 hr	Conduct an inventory of programs that have housing as a component and provide a briefing	Low	staff time, research
17	Briefings to the Board (8 of 13): DCHS - Recommendation of adequate ongoing funding for the Homeless Youth System	DCHS			30-Jun-15	13-Jan-15	1 hr	Recommendation of adequate ongoing funding for the Homeless Youth System: discussion should include a list of current services, funding sources, performance outcomes, and clients served	Medium	staff time, research, budgeting
18	Briefings to the Board (9 of 13): DCHS - Early Learning Hub	DCHS			30-Jun-15	18-Nov-14	1 hr	Briefing on Early Learning Hub	Low	staff time
19	Briefings to the Board (10 of 13): DCHS - Trends in mental health both before and after the implementation of the ACA and expansion of Medicaid	DCHS			30-Jun-15	10-Feb-15	1 hr	Briefing on trends in mental health, both before and after the implementation of the Affordable Care Act and the expansion of Medicaid, including number of visits, percent of patients insured, and other trends in key financial indicators, treatment, or outcomes	Medium	staff time, research, budget/finance
20	Briefings to the Board (11 of 13): District Attorney - Restitution Recovery Pilot project	DA			30-Jun-15	23-Sep-14	45 min	Briefing on the Restitution Recovery Pilot project, including successes, timing and amounts of state funding, and an update on the restructured program and performance	Low	staff time
21	Briefings to the Board (12 of 13): Countywide - Discussion of succession planning across the county	All			30-Jun-15	20-Jan-15	1 hr	Discussion of succession planning across the County, including the County's human resource structures and training capacity	Medium	staff time
22	Briefings to the Board (13 of 13): Countywide - Grant writing efforts in Multnomah County	GR			9/31/2014	7-Oct-14	1 hr	Briefing on approaches and structure of grant writing within each department, examination of the resources county grant writers pursue, including strategy and funding sources, suggestions of efficiencies or increased coordination in Multnomah County grant writing efforts	Low/Medium	staff time
23	Budget Note Process and Guidelines	Budget			30-Sep-14	16-Sep-14	1 hr	Discussion that includes review of FY 2015 budget notes to identify the resources/impact, time commitments, identified timeline necessary to meet requests, proposed criteria and guidelines for submission of future budget notes; identify a vetting process for budget notes	Low	staff time