

ANNOTATED MINUTES

*Tuesday, February 15, 1994 - 9:30 AM
Multnomah County Courthouse, Room 602*

BOARD BRIEFINGS

- B-1 Briefing Requesting Policy Direction on County Response to the State's Request for Plan Amendment and Authorization to Begin Negotiation with State Office of Mental Health Services on Rate Setting. Presented by Judy Robison and Ellen Deck.*

PRESENTATION AND RESPONSE TO BOARD QUESTIONS BY JUDY ROBISON AND ELLEN DECK, WITH HOWARD KLINK. DAVID FUKS, EDGEFIELD CHILDREN'S CENTER, PRESENTED AND EXPLAINED QUESTIONS BY THE PROVIDERS CONCERNING THE PROPOSED MANAGED CARE ENTITY AND THE CHILD MENTAL HEALTH CAPITATION PROJECT AS PRESENTED TO THE BOARD. BOARD CONSENSUS FOR STAFF TO PROCEED WITH NEXT STEP WHICH BEGINS NEGOTIATION WITH THE STATE OFFICE OF MENTAL HEALTH SERVICES ON RATE SETTING.

- B-2 Progress Report on Evaluation of County Diversity Awareness Training. Presented by Curtis Smith and Tom Nesby.*

PRESENTATION AND RESPONSE TO BOARD QUESTIONS BY CURTIS SMITH AND TOM NESBY, WITH GAIL FOSTER.

- B-3 Briefing on the Large Increase of Homeless Youth in Our Community and Ways to Better Serve Them. Presented by Mark Wiener along with Providers, Clients and Representatives from Multnomah County.*

PRESENTATION AND RESPONSE TO BOARD QUESTIONS BY PROVIDERS: CHUCK CURRIE, OUTSIDE IN & COMMUNITY ACTION COMMISSION CHAIR; MARGI DeCHENNE, THE SALVATION ARMY GREENHOUSE; DENNIS MORROW, JANIS YOUTH PROGRAMS; BOB DONOUGH, TRI-COUNTY YOUTH SERVICES CONSORTIUM, PROJECT LUCK; AND TWO CLIENTS FROM OUTSIDE-IN. FURTHER DISCUSSION BY COUNTY STAFF: BILL THOMAS, COMMUNITY ACTION PROGRAM; WITH JAMES EDMONDSON, MARY LI AND WENDY LEBOW, YOUTH PROGRAM OFFICES.

*Tuesday, February 15, 1994 - 1:30 PM
Multnomah County Courthouse, Room 602*

BRIEFINGS

- B-4 Briefing on the 1994-95 Budget for the Division of Assessment and Taxation. Presented*

Presented by Janice Druian and Betsy Williams.

PRESENTATION AND RESPONSE TO BOARD QUESTIONS BY JANICE DRUIAN, MIKE OSWALD AND DAVE WARREN. BOARD REQUESTED RESPONSE TO TAX TITLE QUESTIONS BY THURSDAY, FEBRUARY 17TH'S REGULAR MEETING FROM FACILITIES MANAGEMENT STAFF.

B-5 *Presentation of the Comprehensive Annual Financial Report, Single Audit Report and the Report to Management. Presented by Fred Carter, Multnomah County Audit Committee Chair.*

PRESENTATION AND RESPONSE TO BOARD QUESTION BY DAVE BOYER, JEAN UZELAC AND FRED CARTER.

*Thursday, February 17, 1994 - 9:30 AM
Multnomah County Courthouse, Room 602*

REGULAR MEETING

Chair Beverly Stein convened the meeting at 9:30 a.m., with Vice-Chair Tanya Collie, Commissioners Sharron Kelley, Gary Hansen and Dan Saltzman present.

CONSENT CALENDAR

UPON MOTION OF COMMISSIONER KELLEY, SECONDED BY COMMISSIONER HANSEN, THE CONSENT CALENDAR, (ITEMS C-1 THROUGH C-7) WAS UNANIMOUSLY APPROVED.

SHERIFF'S OFFICE

C-1 *Package Store Liquor License Application Submitted by Sheriff's Office with Recommendation for Approval, for GILL'S JACKPOT FOOD MART, 28210 SE ORIENT DRIVE, GRESHAM*

NON-DEPARTMENTAL

C-2 *In the Matter of the Appointment of Joy Al-Sofi to the Citizen Involvement Committee, District 3 Position, Term Ending 2/28/96*

DEPARTMENT OF HEALTH

C-3 *Ratification of an Intergovernmental Agreement Amendment #1, Contract #201104, between Multnomah County and Office of Medical Assistance Program to Include Hospice Care, for the Period February 1, 1994 through September 30, 1994*

C-4 *Ratification of an Intergovernmental Agreement Amendment #1, Contract #201744,*

between Multnomah County and Office of Medical Assistance Program to Reduce Certain Select Health Services from the Fully Capitated Health Plan (FCHP) and makes them Fee-For-Service, for the Period February 1, 1994 and to Terminate 90 Days from Written Notice

- C-5 *Ratification of an Intergovernmental Agreement Amendment #2, Contract #201744, between Multnomah County and Office of Medical Assistance Program to Add Hospice Care to the Fully Capitate Health Plan (FCHP), for the Period February 1, 1994 through September 30, 1994*
- C-6 *Ratification of an Intergovernmental Agreement Amendment #3, Contract #201744, between Multnomah County and office of Medical Assistance Program to Reflect a Decrease in the States Designated Service Areas and a Resultant Reduction in the Per Capitate Rate in those Areas, for the Period February 1, 1994 through September 30, 1994*
- C-7 *Ratification of an Intergovernmental Agreement, Contract #201974, between Multnomah County and Clackamas County Public Health Division to Become a Primary Care Provider Under CareOregon and to Accept Reimbursement on a Capitate Rate Basis, for the Period Upon Execution and to Terminate 90 Days after Written Notice*

SHERIFF'S OFFICE

- R-1 *RESOLUTION in the Matter of Designation the Multnomah County Sheriff as the Person in Charge of County Premises for Purposes of Excluding Member of the Public and Enforcement of Trespass Laws*

COMMISSIONER HANSEN MOVED AND COMMISSIONER COLLIER SECONDED, APPROVAL OF R-1. LARRY AAB PRESENTED EXPLANATION. RESOLUTION 94-25 UNANIMOUSLY APPROVED.

NON-DEPARTMENTAL

- R-2 *Consideration in the Matter of Setting A Hearing Date on a Adult Care Home Appeal*

PETE KASTING, DEPUTY CITY ATTORNEY FOR THE CITY OF PORTLAND, REPRESENTING THE BOARD OF COUNTY COMMISSIONERS ON THIS ITEM, PRESENTED EXPLANATION AND RESPONSE TO BOARD QUESTIONS REGARDING THE POSSIBLE DECISION TO SET A HEARING DATE TO REVIEW THE APPEAL OF GREG DURHAM FROM THE HEARINGS OFFICER DECISION REVOKING APPELLANT'S ADULT CARE HOME LICENSE.

STEVEN MARKS, ATTORNEY FOR THE APPELLANT, AGREED TO THE PROPOSAL MADE BY PETE KASTING.

CHIP LAZENBY, ASSISTANT COUNTY COUNSEL, PRESENTED AND EXPLAINED WHY A HEARING WOULD BE A WASTE OF

TIME. MR. LAZENBY SUGGESTED THAT THE HEARINGS OFFICER DECISION TO REVOKE APPELLANT'S ADULT CARE HOME LICENSE SHOULD STAND.

MR. KASTING EXPLAINED THAT RULES NOT FOLLOWED COMPLETELY, AND THAT HEARING SHOULD BE GRANTED AND DATE SET.

COMMISSIONER KELLEY MOVED AND COMMISSIONER COLLIER SECONDED, MOTION TO SET HEARING ON MARCH 3, 1994, AT 11:00 TIME CERTAIN, WITH 15 MINUTES PER SIDE TO PRESENT ARGUMENT AND EVIDENCE. ALSO, THE RECORD TO BE HELD OPEN ONE WEEK (UNTIL 5:00 P.M. ON THURSDAY, MARCH 10, 1994) ALLOWING EITHER SIDE TO SUBMIT WRITTEN REBUTTAL TO THE ARGUMENTS AND EVIDENCE PRESENTED DURING THE HEARING. AFTER WHICH THE BOARD OF COUNTY COMMISSIONERS TO REVIEW THE WRITTEN MATERIALS AND PLACE THIS MATTER ON THE BOARD AGENDA ON THURSDAY, MARCH 17, 1994 FOR DISCUSSION AND A TENTATIVE VOTE, WITHOUT FURTHER TESTIMONY FROM THE PARTIES INVOLVED. MOTION UNANIMOUSLY APPROVED.

R-3 RESOLUTION in the Matter of the Termination of Certain Prior Intergovernmental Agreements between Multnomah County and the City of Portland Governing Cable Franchise Administration in Unincorporated County Areas

COMMISSIONER KELLEY MOVED AND COMMISSIONER SALTZMAN SECONDED, APPROVAL OF R-3. DAVID OLSON, DIRECTOR OF THE OFFICE OF CABLE COMMUNICATIONS PRESENTED EXPLANATION AND RESPONSE TO BOARD QUESTIONS.

R-4 RESOLUTION in the Matter of Recommending Endorsement of the Portland-Multnomah County Progress Board Benchmarks for the Community

CHAIR BEVERLY STEIN PASSED THE GAVEL TO VICE-CHAIR TANYA COLLIER. COMMISSIONER STEIN PRESENTED EXPLANATION OF R-4 AND R-4a. UPON MOTION OF COMMISSIONER STEIN, SECONDED BY COMMISSIONER KELLEY, R-4 AND R-4a WERE UNANIMOUSLY APPROVED.

RESOLUTION 94-27 UNANIMOUSLY APPROVED.

R-4a RESOLUTION in the Matter of Recommending Adoption of Benchmarks for Multnomah County Government

RESOLUTION 94-28 UNANIMOUSLY APPROVED.

DEPARTMENT OF ENVIRONMENTAL SERVICES

- R-5 *RESOLUTION in the Matter of Certifying an Estimate of Expenditures for the FY 1994-95 Property Tax Program in Accordance with HB 2338*

JANICE DRUIAN PRESENTED RESPONSE TO BOARD QUESTIONS REGARDING FUNDING AND USE OF INMATE WORK CREWS. UPON MOTION OF COMMISSIONER COLLIER SECONDED BY COMMISSIONER HANSEN, AMENDED TO ADD HALF A WORK CREW TO THE ASSESSMENT & TAXATION BUDGET WAS UNANIMOUSLY APPROVED. UPON MOTION OF COMMISSIONER COLLIER, SECONDED BY COMMISSIONER HANSEN, RESOLUTION 94-29 WAS UNANIMOUSLY APPROVED.

CHILDREN AND FAMILIES SERVICES DIVISION

- R-6 *Request for Approval of a Notice of Intent to Apply to the U.S. Department of Housing and Urban Development for Coordination of Regional Fair Housing Month Activities*

JANET HAWKINS PRESENTED EXPLANATION AND RESPONSE TO BOARD QUESTIONS. UPON MOTION OF COMMISSIONER SALTZMAN, SECONDED BY COMMISSIONER KELLEY, R-6 WAS UNANIMOUSLY APPROVED.

- R-7 *Request for Approval of a Notice of Intent to Apply to the U.S. Department of Housing and Urban Development for Countywide Fair Housing Education and Outreach Activities*

JANET HAWKINS PRESENTED EXPLANATION AND RESPONSE TO BOARD QUESTIONS. UPON MOTION OF COMMISSIONER SALTZMAN, SECONDED BY COMMISSIONER KELLEY, R-7 WAS UNANIMOUSLY APPROVED.

DEPARTMENT OF LIBRARY SERVICES

- R-8 *Budget Modification DLS #3 Requesting Authorization to Reclassify One Librarian 2 to a Central Library Coordinator*

SHIRLEY ROBINSON PRESENTED EXPLANATION AND RESPONSE TO BOARD QUESTIONS. UPON MOTION OF COMMISSIONER KELLEY, SECONDED BY COMMISSIONER SALTZMAN, R-8 WAS UNANIMOUSLY APPROVED.

PUBLIC COMMENT

- R-9 *Opportunity for Public Comment on Non-Agenda Matters. Testimony Limited to Three Minutes Per Person.*

C.H. SANDMAN REQUESTED INFORMATION ON THE PROCESS TO FILE A PETITION TO DISSOLVE METRO. THE BOARD EXPLAINED THE PROCESS AND WHAT WOULD BE REQUIRED.

There being no further business, the meeting was adjourned at 10:45 a.m.

OFFICE OF THE BOARD CLERK
for MULTNOMAH COUNTY

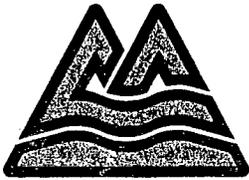
A handwritten signature in cursive script, reading "Carrie A. Parkerson". The signature is written in dark ink and is positioned above the printed name.

Carrie A. Parkerson

BOARD OF COUNTY COMMISSIONERS
FORMAL BOARD MEETING
RESULTS

MEETING DATE: 2-17-94

Agenda Item #	Motion	Second	APP/NOT APP
<u>C-1 thru</u>	<u>SK</u>	<u>GH</u>	<u>App</u>
<u>C-7</u>	<u>S</u>	<u>S</u>	<u>S</u>
<u> </u>	<u> </u>	<u> </u>	<u> </u>
* <u>R-1</u>	<u>GH</u>	<u>TC</u>	<u>App</u>
<i>Set Hearing Date for 3-3-94 15 min Per. Side</i>			
<u>R-2</u>	<u>SK</u>	<u>TC</u>	<u>App</u>
<u> </u>	<u> </u>	<u> </u>	<u> </u>
* <u>R-3</u>	<u>SK</u>	<u>DS</u>	<u>App</u>
* <u>R-4</u>	<u>BS</u>	<u>SK</u>	<u>App</u>
* <u>R-42</u>	<u>BS</u>	<u>SK</u>	<u>S</u>
* <u>R-5</u>	<u>TC</u>	<u>GH</u>	<u>App</u>
<u>Amendment</u>	<u>TC</u>	<u>GH</u>	<u>App</u>
<u>R-6</u>	<u>DS</u>	<u>SK</u>	<u>App</u>
<u>R-7</u>	<u>DS</u>	<u>SK</u>	<u>App</u>
<u>R-8</u>	<u>SK</u>	<u>DS</u>	<u>App</u>
<u>Public Comment</u>	<u> </u>	<u> </u>	<u> </u>



MULTNOMAH COUNTY OREGON

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

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

AGENDA

MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS

FOR THE WEEK OF

FEBRUARY 14, 1994 - FEBRUARY 18, 1994

- Tuesday, February 15, 1994 - 9:30 AM - Board Briefings.Page 2*
- Tuesday, February 15, 1994 - 1:30 PM - Board Briefings.Page 2*
- Thursday, February 17, 1994 - 9:30 AM - Regular Meeting.Page 2*

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

Tuesday, February 15, 1994 - 9:30 AM

Multnomah County Courthouse, Room 602

BOARD BRIEFINGS

- B-1 *Briefing Requesting Policy Direction on County Response to the State's Request for Plan Amendment and Authorization to Begin Negotiation with State Office of Mental Health Services on Rate Setting. Presented by Judy Robison and Ellen Deck. 9:30 AM TIME CERTAIN - 30 MINUTES REQUESTED.*
- B-2 *Progress Report on Evaluation of County Diversity Awareness Training. Presented by Curtis Smith and Tom Nesby. 10:00 AM TIME CERTAIN - 45 MINUTES REQUESTED.*
- B-3 *Briefing on the Large Increase of Homeless Youth in Our Community and Ways to Better Serve Them. Presented by Mark Wiener along with Providers, Clients and Representatives from Multnomah County. 10:45 AM TIME CERTAIN - 1 HOUR REQUESTED.*
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Tuesday, February 15, 1994 - 1:30 PM

Multnomah County Courthouse, Room 602

BRIEFINGS

- B-4 *Briefing on the 1994-95 Budget for the Division of Assessment and Taxation. Presented by Janice Druian and Betsy Williams. 1:30 PM TIME CERTAIN - 30 MINUTES REQUESTED.*
- B-5 *Presentation of the Comprehensive Annual Financial Report, Single Audit Report and the Report to Management. Presented by Fred Carter, Multnomah County Audit Committee Chair. 2:00 PM TIME CERTAIN - 30 MINUTES REQUESTED.*
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Thursday, February 17, 1994 - 9:30 AM

Multnomah County Courthouse, Room 602

REGULAR MEETING

CONSENT CALENDAR

SHERIFF'S OFFICE

- APD*
C-1 *Package Store Liquor License Application Submitted by Sheriff's Office with Recommendation for Approval, for GILL'S JACKPOT FOOD MART, 28210 SE ORIENT DRIVE, GRESHAM*

NON-DEPARTMENTAL

APP C-2 In the Matter of the Appointment of Joy Al-Sofi to the Citizen Involvement Committee, District 3 Position, Term Ending 2/28/96

DEPARTMENT OF HEALTH

C-3 Ratification of an Intergovernmental Agreement Amendment #1, Contract #201104, between Multnomah County and Office of Medical Assistance Program to Include Hospice Care, for the Period February 1, 1994 through September 30, 1994

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Regular Agenda
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APP R-1 RESOLUTION in the Matter of Designation the Multnomah County Sheriff as the Person in Charge of County Premises for Purposes of Excluding Members of the Public and Enforcement of Trespass Laws

NON-DEPARTMENTAL

APP R-2 Consideration in the Matter of Setting A Hearing Date on a Adult Care Home Appeal
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CHILDREN AND FAMILIES SERVICES DIVISION

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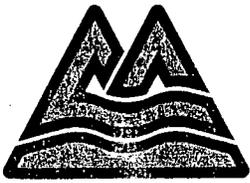
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SHERIFF'S OFFICE

- C-1 Package Store Liquor License Application Submitted by Sheriff's Office with Recommendation for Approval, for GILL'S JACKPOT FOOD MART, 28210 SE ORIENT DRIVE, GRESHAM

NON-DEPARTMENTAL

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- R-4 *RESOLUTION in the Matter of Recommending Endorsement of the Portland-Multnomah County Progress Board Benchmarks for the Community*

DEPARTMENT OF ENVIRONMENTAL SERVICES

- R-5 *RESOLUTION in the Matter of Certifying an Estimate of Expenditures for the FY 1994-95 Property Tax Program in Accordance with HB 2338* 94-29

CHILDREN AND FAMILIES SERVICES DIVISION

- R-6 *Request for Approval of a Notice of Intent to Apply to the U.S. Department of Housing and Urban Development for Coordination of Regional Fair Housing Month Activities*
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DEPARTMENT OF LIBRARY SERVICES

- R-8 *Budget Modification DLS #3 Requesting Authorization to Reclassify One Librarian 2 to a Central Library Coordinator*

PUBLIC COMMENT

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SUPPLEMENTAL AGENDA

Thursday, February 17, 1994 - 9:30 AM

Multnomah County Courthouse, Room 602

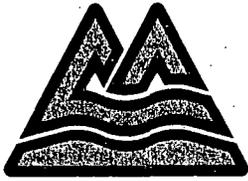
REGULAR MEETING

NON-DEPARTMENTAL

*R-4a RESOLUTION in the Matter of Recommending Adoption of Benchmarks for
Multnomah County Government*

Asst

1994-1.AGE/32/cap



MULTNOMAH COUNTY OREGON

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NON-DEPARTMENTAL

*R-4a RESOLUTION in the Matter of Recommending Adoption of Benchmarks for
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94-28

1994-1.AGE/32/cap

MEETING DATE FEB 17 1994

AGENDA NO. C-1

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

Subject: OLCC Application

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING Date Requested: _____

Amount of Time Needed: _____

DEPARTMENT Sheriff's Office DIVISION _____

CONTACT Sergeant Kathy Ferrell TELEPHONE 251-2431

BLDG/ROOM # 313/115

PERSON(S) MAKING PRESENTATION: Sergeant Ferrell

ACTION REQUESTED:

() INFORMATIONAL ONLY () POLICY DIRECTION () APPROVAL () OTHER

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

Attached is a package store/change of ownership OLCC application for Gill's Jackpot Food Mart, located at 28210 SE Orient Drive, Gresham, Oregon 97080.

The owners, Sukhdev Singh Gill and Sarjeet Kaur Gill, have no appreciable criminal record and tax requirements have been met.

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

OR

DEPARTMENT MANAGER: Sgt. Kathy Ferrell

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

Any questions call the Office of the Board Clerk, 248-3277/248-5222

KF/lbs/5317

BOARD OF
COUNTY COMMISSIONERS
CLATSOP COUNTY
OREGON
FEB 10 PM 3:20

APPLICATION

STATE OF OREGON
OREGON LIQUOR CONTROL COMMISSION

Return To:

GENERAL INFORMATION

A non-refundable processing fee is assessed when you submit this completed form to the Commission (except for Druggist and Health Care Facility Licenses). The filing of this application does not commit the Commission to the granting of the license for which you are applying nor does it permit you to operate the business named below.

(THIS SPACE IS FOR OLCC OFFICE USE)

Application is being made for:

- DISPENSER, CLASS A
DISPENSER, CLASS B
DISPENSER, CLASS C
PACKAGE STORE-P
RESTAURANT
RETAIL MALT BEVERAGE
SEASONAL DISPENSER
WHOLESALE MALT BEVERAGE & WINE
WINERY
Add Partner
Additional Privilege
Change Location
Change Ownership
Change of Privilege
Greater Privilege
Lesser Privilege
New Outlet
Other

OTHER:
\$62.50 License fee
#7170
Larry Jackson

DEC 8 1993

(THIS SPACE IS FOR CITY OR COUNTY USE)

NOTICE TO CITIES AND COUNTIES: Do not consider this application unless it has been stamped and signed at the left by an OLCC representative.

THE CITY COUNCIL, COUNTY COMMISSION, OR COUNTY

COURT OF MULTNOMAH COUNTY
(Name of City or County)

RECOMMENDS THAT THIS LICENSE BE: GRANTED X DENIED

DATE February 17, 1994

BY [Signature]
(Signature)

TITLE Multnomah County Chair

CAUTION: If your operation of this business depends on your receiving a liquor license, OLCC cautions you not to purchase, remodel, or start construction until your license is granted.

- 1. Name of Corporation, Partnership, or Individual Applicants:
1) SURHDEV SINGH GILL
2)
3) SARJEET KAUR GILL
4)
5)
6)
(EACH PERSON LISTED ABOVE MUST FILE AN INDIVIDUAL HISTORY AND A FINANCIAL STATEMENT)

2. Present Trade Name GILL'S JACKPOT FOODMART

3. New Trade Name SAME AS ABOVE Year filed with Corporation Commissioner

4. Premises address 28210 SE. ORIENT DR GRESHAM OR 97080
(Number, Street, Rural Route) (City) (County) (State) (Zip)

5. Business mailing address SAME AS ABOVE
(P.O. Box, Number, Street, Rural Route) (City) (State) (Zip)

6. Was premises previously licensed by OLCC? Yes [X] No Year 1993

7. If yes, to whom: HARJINDER S. GILL Type of license: PACKAGE STORE-P

8. Will you have a manager: Yes [X] No Name SURHDEV S. GILL
(Manager must fill out Individual History)

9. Will anyone else not signing this application share in the ownership or receive a percentage of profits or bonus from the business? Yes No [X]

10. What is the local governing body where your premises is located? GRESHAM (?) / MULTNOMAH COUNTY
(Name of City or County)

11. OLCC representative making investigation may contact: SURHDEV GILL
(Name)
1802 NE. HOGAN DR, GRESHAM 97030 503-665-5905 OR 663-2931
(Address) (Tel. No. - home, business, message)

CAUTION: The Administrator of the Oregon Liquor Control Commission must be notified if you are contacted by anybody offering to influence the Commission on your behalf.

DATE Dec 8, 93

- Applicant(s) Signature:
1) Surhdev Gill
2) Sarjeet Kaur Gill
3)
4)
5)
6)
Original - Local Government

MEETING DATE: FEB 17 1994

AGENDA NO: C-2

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: APPOINTMENT

BOARD BRIEFING Date Requested:

Amount of Time Needed:

REGULAR MEETING: Date Requested: 2/17/94

Amount of Time Needed: CONSENT AGENDA

DEPARTMENT: Nondepartmental DIVISION: County Chair's Office

CONTACT: Delma Farrell TELEPHONE #: X-3953 BLDG/ROOM #: 106/1410

PERSON(S) MAKING PRESENTATION:

ACTION REQUESTED:

[] INFORMATIONAL ONLY [] POLICY DIRECTION [X] APPROVAL [] OTHER

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

Appointment of Joy Al-Sofi to Citizen Involvement Committee, District 3 Position, for a term ending 2/28/96

BOARD OF COUNTY COMMISSIONERS 1994 FEB 10 AM 8:16 MULTNOMAH COUNTY OREGON

SIGNATURES REQUIRED:

ELECTED OFFICIAL: Beverly Steen

OR

DEPARTMENT MANAGER:

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

DIST 3

INTEREST FORM FOR MULTNOMAH COUNTY
CITIZEN INVOLVEMENT COMMITTEE

In order for the Multnomah County Commission to assess more thoroughly the qualifications of persons interested in serving on the Citizen Involvement Committee, you are requested to fill out this interest form. Please feel free to attach or enclose supplemental information or a resume which further details your involvement in volunteer activities, public affairs, civic services, affiliations, etc.

We consider information from Sections I through III public, and it may be used in press releases announcing appointments.

NAME OF NOMINATING GROUP: Kerns Neighborhood Assoc.

SECTION I

NAME: Joy C. Al-Safi HOME PHONE: 239-4854

ADDRESS: 636 NE 22ND WORK PHONE: _____

Is your residence located in Multnomah County?

YES NO

SECTION II

Why are you interested in serving on the Multnomah County Citizen Involvement Committee?

I am active in many issues and have a particular interest in County-citizen issues

SECTION III

Please list three volunteer/civic activities:

- ORGANIZATION: 1. Citizens Services Committee ^{Chair} DATE: 1992-93
- 2. Mult Co. Democratic party DATE: 1991-current
- 3. Mult Co Planning Commission DATE: 1991-1993

RESPONSIBILITIES: Planning Commission - I made decisions regarding land use issues.

In the Citizens Convention, I used my role as chair of the Tax Assessment Committee to facilitate between highly divergent views.

SECTION IV

Please list the name, address and telephone numbers of two people who may be contacted as references. Please name those who know about your interests and qualifications to serve on the Citizen Involvement Committee:

Angel Olson

John Segay

SECTION V

Please state any potential conflicts of interest between private life and public service which might result from service on the Citizen Involvement Committee:

NONE

SECTION VI

In order to assist Multnomah County in meeting affirmative action goals, additional information is requested of you. This section is voluntary and will remain confidential.

BIRTH DATE: Month 1 Day 29 Year 45 SEX: Female Male

ETHNIC ORIGIN: Asian Black Hispanic
Native American White

My signature affirms that all information is true to the best of my knowledge. I understand that any misstatement of fact or misrepresentation of credentials may result in this application being disqualified from further consideration or, subsequent to my appointment to the Citizen Involvement Committee, may result in my dismissal from that Committee.

Signature: Joy C. A.C. - Sof Date: 10/20/93

December 9, 1993

Ms. Carol Ward
Multnomah County Citizens Involvement Committee
2115 SE Morrison, #215
Portland, OR 97214

Dear Ms. Ward

As co-chairman of the Kerns Neighborhood Association (Kerns) and on behalf of the Board of Directors of Kerns, it is my pleasure to recommend that Ms. Joy Al-Sofi represent the residents of the Kerns neighborhood on the Multnomah County Citizens Involvement Committee (Committee). Inherent in this recommendation, Ms. Al-Sofi will represent the interests of the residents of the Kerns neighborhood as a member of the Committee and will report on Committee progress to the residents of Kerns at the regularly scheduled and ad-hoc general meetings of the Kerns neighborhood.

I look forward to working with the Committee through Ms. Al-Sofi. If you have any questions please contact me at (503) 236-8072.

Sincerely,



Peter P. Blood
Co-Chairman, Kerns Neighborhood
Association

cc:
KNA, Board of Directors
J. Al-Sofi

MEETING DATE: FEB 17 1994

AGENDA NO: C-3

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: Ratification of amendment #1 to agreement with the Office of Medical Assistance Program (OMAP)

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 5 minutes or less

DEPARTMENT: HEALTH **DIVISION:** _____

CONTACT: Fronk **TELEPHONE #:** 4274
BLDG/ROOM #: 160/7

PERSON(S) MAKING PRESENTATION: Fronk or Mary Lou Henrich

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

Ratification of amendment #1 to agreement with Office of Medical Assistance Programs (OMAP). Contract #201104 between (OMAP) and Multnomah County DBA Multicare Dental is being amended to reflect a change in attachment 1 that will include Hospice care. Hospice care will be included in the FCHP BASIC SERVICES subcategory under FCHP SERVICE CATEGORIES FOR CAPITATION RATES.

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

OR

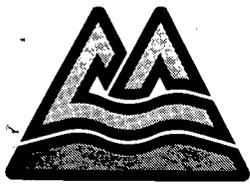
DEPARTMENT MANAGER: Billi Odgaard

MULTNOMAH COUNTY
OREGON
1994 FEB - 8 AM 10:30
BOARD OF
COUNTY CLERK

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Sent Originals to Jim Kennedy on 2-17-94.*



MULTNOMAH COUNTY OREGON



HEALTH DEPARTMENT
426 S.W. STARK STREET, 8TH FLOOR
PORTLAND, OREGON 97204-2394
(503) 248-3674
FAX (503) 248-3676
TDD (503) 248-3816

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Beverly Stein, Multnomah County Chair

From: Bill Odegaard, Health Department Director

REQUESTED PLACEMENT DATE: February 17, 1994

DATE: February 7, 1994

SUBJECT: Amendment #1 to Intergovernment Agreement with Oregon Medical Assistance Program (OMAP) Dental Care Organization (DCO).

I. Recommendation/Action Requested: The Health Department recommends approval of amendment #1 to intergovernmental agreement with OMAP for period February 1, 1994 through September 30, 1994. This agreement was received in this office January 31, 1994.

II. Background/Analysis: This amendment is in direct support of CareOregon. This amendment adds hospice care to the fully capitated health care (FCHP) basic services subcategory of the OMAP/DCO agreement.

III. Financial Impact: The addition of this subcategory will increase will increase the costs of services with no increase in the capitated rate.

IV. Legal Issues: none

V. Controversial Issues: none.

VI. Link to Current County Policies: This agreement is in direct support of CareOregon. The County Board passed a resolution in December, 1993 in support of CareOregon.

VII. Citizen Participation: none.

VIII. Other Government Participation: OMAP is a division of the Oregon Department of Human Resources. Clackamas County Health Department and OHSU are participating in CareOregon.



CONTRACT APPROVAL FORM

(See Administrative Procedure #2106)

MULTNOMAH COUNTY OREGON

Contract # 201104

Amendment # 1

<p style="text-align: center;">CLASS I</p> <input type="checkbox"/> Professional Services under \$25,000	<p style="text-align: center;">CLASS II</p> <input type="checkbox"/> Professional Services over \$25,000 (RFP, Exemption) <input type="checkbox"/> PCRB Contract <input type="checkbox"/> Maintenance Agreement <input type="checkbox"/> Licensing Agreement <input type="checkbox"/> Construction <input type="checkbox"/> Grant <input type="checkbox"/> Revenue	<p style="text-align: center;">CLASS III</p> <input checked="" type="checkbox"/> Intergovernmental Agreement APPROVED MULTNOMAH COUNTY BOARD OF COMMISSIONERS AGENDA # <u>C-3</u> DATE <u>2/17/94</u> <u>Carrie A. Parkerson</u> BOARD CLERK REVENUE
--	--	---

Department HEALTH Division _____ Date FEB 7, 1994

Contract Originator Kennedy Phone x6747 Bldg/Room 160/8

Administrative Contact Fronk Phone x4274 Bldg/Room 160/7

Description of Contract Amendment to Oregon Health Plan Dental Care Organization Agreement adding Hospice care.

RFP/BID # _____ Date of RFP/BID _____ Exemption Exp. Date _____

ORS/AR # _____ Contractor is MBE WBE QRF

Contractor Name Office of Medical Assistance Programs

Mailing Address 500 Summer Street NE
Salem, Oregon 97310-1014

Phone (503) 378-2263

Employer ID# or SS# _____

Effective Date February 1, 1994

Termination Date September 30, 1994

Original Contract Amount \$ Requirements

Total Amount of Previous Amendments \$ _____

Amount of Amendment \$ N/A

Total Amount of Agreement \$ Requirements

Remittance Address _____
(If Different) _____

Payment Schedule _____ Terms _____

Lump Sum \$ _____ Due on receipt

Monthly \$ _____ Net 30

Other \$ _____ Other _____

Requirements contract - Requisition required.

Purchase Order No. _____

Requirements Not to Exceed \$ _____

REQUIRED SIGNATURES:

Department Manager Belli Odegaard

Purchasing Director (Class II Contracts Only) _____

County Counsel _____

County Chair / Sheriff _____

Contract Administration (Class I, Class II Contracts Only) _____

Encumber: Yes No

Date 2/7/94

Date _____

Date 7 Feb 94

Date 2/17/94

Date _____

VENDOR CODE			VENDOR NAME						TOTAL AMOUNT \$		
LINE NO.	FUND	AGENCY	ORGANIZATION	SUB ORG.	ACTIVITY	OBJECT/ REV SRC	SUB OBJ	REPT CATEG	LGFS DESCRIPTION	AMOUNT	INC/ DEC IND
01.	156	015	0810			2602		0316	DCO	Requirements	
02.											
03.											

* If additional space is needed, attach separate page. Write contract # on top of page.

INSTRUCTIONS ON REVERSE SIDE

OMAP Contract #30485-1

AMENDMENT TO DENTAL CARE ORGANIZATION AGREEMENT

1. This contract is between the State of Oregon, acting by and through its Department of Human Resources, Office of Medical Assistance Programs, hereafter called "DIVISION", and

Multnomah County
DBA Multicare Dental
426 SW Stark, 8th Floor
Portland, Oregon 97204

hereafter called "CONTRACTOR".

2. This amendment is Amendment No. 1 to original contract number 30485. This amendment reflects a change in Attachment 1 (Oregon Health Plan Service Categories for Per Capita Costs) for FCHP Basic Services under the FCHP Service Categories for Capitation Rates section. Hospice care is included. Changes will be shown with old information in [brackets] and new information being underlined.
3. The FCHP BASIC SERVICES subcategory under FCHP SERVICE CATEGORIES FOR CAPITATION RATES shall be amended to read:

Inpatient Hospital - Basic

11.	Inpatient Hospital - Med/Surg	25
9.	Inpatient Hospital - Acute Detox	23
8.	<u>Hospice</u>	<u>22</u>

4. In performing the above, it is understood and agreed that all other terms and conditions of the original contract are still in effect.



Barbara Roberts
Governor

500 Summer Street NE
Salem OR 97310-1014
Salem - (503) 378-2263
FAX - (503) 373-7689
TDD - (503) 378-6791

5. SIGNATURES

CONTRACTOR

STATE OF OREGON
OFFICE OF MEDICAL ASSISTANCE PROGRAMS
500 Summer St., N.E.
Salem, Oregon 97310-1014

By *Beverly Stein*
Authorized Representative
Beverly Stein
Title Multnomah County Chair
Date 2-17-94

By _____
Authorized Representative
Date _____

Reviewed by OMAP Contracts Manager:

Reviewed by OMAP Managed Care Program Manager:

Reviewed by OMAP Asst. Director:

Approved as to Legal Sufficiency:

Assistant Attorney General

REVIEWED:

LAURENCE B. KRESSEL, County
Counsel for Multnomah County,
Oregon

By: *L. Kessel*
Date: 7 Feb 94

APPROVED MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C-3 DATE 2-17-94
Christine Fox
BOARD CLERK

Associate Regional Administrator
Division of Medicaid
Health Care Financing Admin., Region 10
Dept. of Health & Human Services

MEETING DATE: FEB 17 1994

AGENDA NO: C-4

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: Ratification of #1 amendment with the office of Medical Assistance Programs

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 5 minutes or less

DEPARTMENT: Health **DIVISION:** _____

CONTACT: Tom FRonk **TELEPHONE #:** 4274

BLDG/ROOM #: 160/7

PERSON(S) MAKING PRESENTATION: Tom Fronk or Mary Lou Hennrich

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

Amendment #1 reflects the reduction of Douglas County from the state's designated service area; an elimination of fully capitated health plan optional services, and the resultant decrease in capitation rates.

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

OR

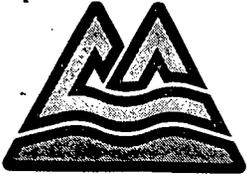
DEPARTMENT MANAGER: Billi Odgaard

MULTIOMAH COUNTY
OREGON
BOARD OF
COUNTY COMMISSIONERS
1994 FEB - 8 AM 10:39

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Sent Originals to Jim Kennedy on 2-17-94.*



MULTNOMAH COUNTY OREGON



HEALTH DEPARTMENT
426 S.W. STARK STREET, 8TH FLOOR
PORTLAND, OREGON 97204-2394
(503) 248-3674
FAX (503) 248-3676
TDD (503) 248-3816

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Beverly Stein, Multnomah County Chair

From: *B. Odgaard*
B. Odgaard, Health Department Director

REQUESTED PLACEMENT DATE: February 17, 1994

DATE: February 7, 1994

SUBJECT: Amendments #1 and #3 to Intergovernment Agreement with Oregon Medical Assistance Program (OMAP).

I. Recommendation/Action Requested: The Health Department recommends approval of amendments #1 and #3 to intergovernmental agreement with OMAP for period February 1, 1994 through September 30, 1994. These amendments were received in this office January 31, 1994.

II. Background/Analysis: These amendments are in direct support of CareOregon. These amendments delete certain counties from the state's designated service areas; reduces certain select health services from the fully capitated health plan (FCHP) and makes them fee-for-service, and reduces the capitation rate due to the reduction in the FCHP.

III. Financial Impact: The change from capitated rate to fee-for-service for certain select services will not have any measurable impact on CareOregon's budget.

IV. Legal Issues: none

V. Controversial Issues: none.

VI. Link to Current County Policies: This agreement is in direct support of CareOregon. The County Board passed a resolution in December, 1993 in support of CareOregon.

VII. Citizen Participation: none.

VIII. Other Government Participation: OMAP is a division of the Oregon Department of Human Resources. Clackamas County Health Department and OHSU are participating in CareOregon.



CONTRACT APPROVAL FORM

(See Administrative Procedure #2106)

MULTNOMAH COUNTY OREGON

Contract # 201744

Amendment # 1

<p>CLASS I</p> <input type="checkbox"/> Professional Services under \$25,000	<p>CLASS II</p> <input type="checkbox"/> Professional Services over \$25,000 (RFP, Exemption) <input type="checkbox"/> PCRB Contract <input type="checkbox"/> Maintenance Agreement <input type="checkbox"/> Licensing Agreement <input type="checkbox"/> Construction <input type="checkbox"/> Grant <input type="checkbox"/> Revenue	<p>CLASS III</p> <input checked="" type="checkbox"/> Intergovernmental Agreement
---	---	---

APPROVED MULTNOMAH COUNTY BOARD OF COMMISSIONERS
 AGENDA # C-4 DATE 2/17/94
Carrie A. Parkerson
 BOARD CLERK

Department Health Division _____ Date February 7, 1994

Contract Originator Jim Kennedy Phone 6747 Bldg/Room 160/8

Administrative Contact Tom Fronk Phone 4274 Bldg/Room 160/7

Description of Contract This amendment reduces certain select health services from the fully capitated health plan (FCHP), and makes them fee-for-service. It also deletes Douglas County from the designated service area, and reduces the capitated rate due to the reduction in the FCHP.

RFP/BID # _____ Date of RFP/BID _____ Exemption Exp. Date _____

ORS/AR # _____ Contractor is MBE WBE QRF

Contractor Name Office of Medical Assistance
 Mailing Address 500 Summer St NE
Salem, Oregon 97210
 Phone 378-2263
 Employer ID# or SS# _____
 Effective Date February 1, 1994
 Termination Date 90 days written notice
 Original Contract Amount \$ requirements
 Total Amount of Previous Amendments \$ requirements
 Amount of Amendment \$ requirements
 Total Amount of Agreement \$ requirements

Remittance Address _____
 (If Different) _____

Payment Schedule _____ Terms _____

Lump Sum \$ _____ Due on receipt
 Monthly \$ _____ Net 30
 Other \$ _____ Other _____
 Requirements contract - Requisition required.

Purchase Order No. _____
 Requirements Not to Exceed \$ _____

REQUIRED SIGNATURES:

Department Manager Belli Adigaard
 Purchasing Director _____
 (Class II Contracts Only)
 County Counsel _____
 County Chair / Sheriff _____
 Contract Administration _____
 (Class I, Class II Contracts Only)

Encumber: Yes No
 Date 2/1/94
 Date _____
 Date 7 Feb 94
 Date 2/17/94
 Date _____

VENDOR CODE		VENDOR NAME								TOTAL AMOUNT	\$
LINE NO.	FUND	AGENCY	ORGANIZATION	SUB ORG	ACTIVITY	OBJECT/ REV SRC	SUB OBJ	REPT CATEG	LGFS DESCRIPTION	AMOUNT	INC/ DEC IND
01.	156	015	0650						OMAP	req	
02.											
03.											

* If additional space is needed, attach separate page. Write contract # on top of page.

OMAP Contract #30464-1

AMENDMENT TO
FULLY CAPITATED HEALTH PLAN AGREEMENT

1. This contract is between the State of Oregon, acting by and through its Department of Human Resources, Office of Medical Assistance Programs, hereafter called "DIVISION", and

Multnomah County
DBA CareOregon
1500 SW 1st Ave., Ste. 250
Portland, OR 97201

hereafter called "CONTRACTOR".

2. This amendment is Amendment No. 1 to original contract number 30464. This amendment reflects a decrease in the designated Service Areas in the 1. Status of Contractor section. This amendment also reflects an elimination of FCHP Optional Services in the 3. Statement of Work section with a resultant decrease in the Capitation Rates in the 5. Consideration section. Changes will be shown with old information in [brackets] and new information being underlined.

3. The 1. STATUS OF CONTRACTOR shall be amended to read:

Contractor's maximum enrollment limit is:

53,500 for Multnomah, Clackamas, and
Washington Counties,
8,000 for Linn, Benton, Marion, Polk, and
Yamhill Counties,
1,200 for Lane County
4,800 for Jackson[,] and Josephine [and
Douglas] Counties, and
8,400 for Klamath, Malheur, Umatilla, and
Union Counties.

4. The 3. STATEMENT OF WORK shall be amended to read:

[FCHP Optional

Hearing Aids, Batteries, Nonphysician Services
Inpatient Hospital - Family Planning
Inpatient Hospital - Therapeutic Abortion
Outpatient Hospital - Family Planning
Outpatient Hospital - Therapeutic Abortion



Barbara Roberts
Governor

Physician - Family Planning
 Physician - Therapeutic Abortion
 Prescription Drugs - Family Planning]

5. The 5. CONSIDERATION Section A.(1) shall be amended to read:

(a) Service Area: Multnomah, Clackamas, and Washington Counties

[\$104.67]	<u>\$ 99.42</u>	for OHP Eligibles
[\$639.33]	<u>\$602.41</u>	for PLM Adults
[\$147.93]	<u>\$147.90</u>	for PLM Children
[\$298.95]	<u>\$298.59</u>	for GA Recipients

(b) Service Area: Linn, Benton, Marion, Polk, and Yamhill Counties

[\$ 96.66]	<u>\$ 91.79</u>	for OHP Eligibles
[\$585.97]	<u>\$552.05</u>	for PLM Adults
[\$135.43]	<u>\$135.40</u>	for PLM Children
[\$273.64]	<u>\$273.30</u>	for GA Recipients

(c) Service Area: Lane County

[\$ 97.23]	<u>\$ 92.33</u>	for OHP Eligibles
[\$589.57]	<u>\$555.43</u>	for PLM Adults
[\$136.11]	<u>\$136.08</u>	for PLM Children
[\$274.86]	<u>\$274.51</u>	for GA Recipients

(d) Service Area: Jackson[,] and Josephine [and Douglas] Counties

[\$ 97.75]	<u>\$ 92.84</u>	for OHP Eligibles
[\$593.51]	<u>\$559.20</u>	for PLM Adults
[\$137.42]	<u>\$137.38</u>	for PLM Children
[\$277.89]	<u>\$277.55</u>	for GA Recipients

(e) Service Area: Other counties, as identified on Page 1

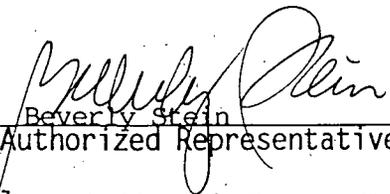
[\$ 95.55]	<u>\$ 90.73</u>	for OHP Eligibles
[\$578.34]	<u>\$544.83</u>	for PLM Adults
[\$133.46]	<u>\$133.43</u>	for PLM Children
[\$269.47]	<u>\$269.12</u>	for GA Recipients

6. In performing the above, it is understood and agreed that all other terms and conditions of the original contract are still in effect.

5. SIGNATURES

CONTRACTOR

STATE OF OREGON
OFFICE OF MEDICAL ASSISTANCE PROGRAMS
500 Summer St., N.E.
Salem, Oregon 97310-1014

By 
Beverly Stein
Authorized Representative
Title Multnomah County Chair
Date 2-17-94

By _____
Authorized Representative
Date _____

REVIEWED:

Reviewed by OMAP Contracts Manager:

Reviewed by OMAP Managed Care Program
Manager:

Laurence Kressel, County Counsel
for Multnomah County, Oregon

Reviewed by OMAP Asst. Director:

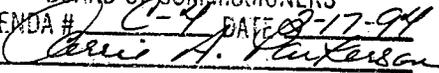
By 

Approved as to Legal Sufficiency:

Date 7 Feb 94

Assistant Attorney General

Associate Regional Administrator
Division of Medicaid
Health Care Financing Admin., Region 10
Dept. of Health & Human Services

APPROVED MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C-4 DATE 2-17-94

BOARD CLERK

MEETING DATE: FEB 17 1994

AGENDA NO: C-5

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: Ratification of amendment #2 to agreement with the Office of Medical Assistance Programs,

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 5 minutes or less

DEPARTMENT: Health DIVISION: _____

CONTACT: Tom Fronk TELEPHONE #: 4274
BLDG/ROOM #: 160/7

PERSON(S) MAKING PRESENTATION: Tom Fronk

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

Amendment #2 to the OMAP agreement adds hospice care to the fully capitated health plan(FCHP).

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

OR

DEPARTMENT MANAGER: Billi Odgaard

BOARD OF
COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1994 FEB - 8 AM 10:38

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C163 *Sent Originals to Jim Kennedy on 2-17-94.*



MULTNOMAH COUNTY OREGON

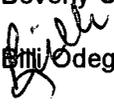


HEALTH DEPARTMENT
426 S.W. STARK STREET, 8TH FLOOR
PORTLAND, OREGON 97204-2394
(503) 248-3674
FAX (503) 248-3676
TDD (503) 248-3816

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Beverly Stein, Multnomah County Chair

From:  Odegaard, Health Department Director

REQUESTED PLACEMENT DATE: February 17, 1994

DATE: February 7, 1994

SUBJECT: Amendment #2 to Intergovernment Agreement with Oregon Medical Assistance Program (OMAP).

I. Recommendation/Action Requested: The Health Department recommends approval of amendment #2 to intergovernmental agreement with OMAP for period February 1, 1994 through September 30, 1994. This amendment was received in this office January 31, 1994.

II. Background/Analysis: This amendment is in direct support of CareOregon. This amendment adds hospice care to the fully capitated health care (FCHP) basic services subcategory of the OMAP agreement.

III. Financial Impact: The addition of this subcategory will increase the costs of services with no increase in the capitated rate.

IV. Legal Issues: none

V. Controversial Issues: none.

VI. Link to Current County Policies: This agreement is in direct support of CareOregon. The County Board passed a resolution in December, 1993 in support of CareOregon.

VII. Citizen Participation: none.

VIII. Other Government Participation: OMAP is a division of the Oregon Department of Human Resources. Clackamas County Health Department and OHSU are participating in CareOregon.



CONTRACT APPROVAL FORM

(See Administrative Procedure #2106)

MULTNOMAH COUNTY OREGON

Contract # 201744

Amendment # 2

<p style="text-align: center;">CLASS I</p> <input type="checkbox"/> Professional Services under \$25,000	<p style="text-align: center;">CLASS II</p> <input type="checkbox"/> Professional Services over \$25,000 (RFP, Exemption) <input type="checkbox"/> PCRB Contract <input type="checkbox"/> Maintenance Agreement <input type="checkbox"/> Licensing Agreement <input type="checkbox"/> Construction <input type="checkbox"/> Grant <input type="checkbox"/> Revenue	<p style="text-align: center;">CLASS III</p> <input checked="" type="checkbox"/> Intergovernmental Agreement APPROVED MULTNOMAH COUNTY BOARD OF COMMISSIONERS AGENDA # <u>C-5</u> DATE <u>2/17/94</u> <u>Carrie A. Parkerson</u> BOARD CLERK
--	--	--

Department Health Division _____ Date February 7, 1994

Contract Originator Jim Kennedy Phone 6747 Bldg/Room 160/8

Administrative Contact Tom Fronk Phone 4274 Bldg/Room 160/7

Description of Contract This amendment #2 includes hospice care as part of the Oregon Health Plan Service Categories

RFP/BID # _____ Date of RFP/BID _____ Exemption Exp. Date _____

ORS/AR # _____ Contractor is MBE WBE ORF

Contractor Name Office of Medical Assistance Programs

Mailing Address 500 Summer St NE

Phone 378-2263

Employer ID# or SS# _____

Effective Date February 1, 1994

Termination Date September 30, 1994

Original Contract Amount \$ requirements

Total Amount of Previous Amendments \$ requirements

Amount of Amendment \$ requirements

Total Amount of Agreement \$ requirements

Remittance Address _____ (If Different) _____

Payment Schedule	Terms
<input type="checkbox"/> Lump Sum \$ _____	<input type="checkbox"/> Due on receipt
<input type="checkbox"/> Monthly \$ _____	<input type="checkbox"/> Net 30
<input type="checkbox"/> Other \$ _____	<input type="checkbox"/> Other _____
<input type="checkbox"/> Requirements contract - Requisition required.	
Purchase Order No. _____	
<input type="checkbox"/> Requirements Not to Exceed \$ _____	

REQUIRED SIGNATURES:

Department Manager Belli Odgaard

Purchasing Director (Class II Contracts Only) _____

County Counsel _____

County Chair / Sheriff _____

Contract Administration (Class I, Class II Contracts Only) _____

Encumber: Yes No Date 2/7/94

Date _____

Date 7 Feb 94

Date 2/17/94

Date _____

VENDOR CODE			VENDOR NAME							TOTAL AMOUNT	\$
LINE NO.	FUND	AGENCY	ORGANIZATION	SUB ORG	ACTIVITY	OBJECT/ REV SRC	SUB OBJ	REPT CATEG	LGFS DESCRIPTION	AMOUNT	INC/ DEC IND
01.	156	015	0650						OMAP	req	
02.											
03.											

* If additional space is needed, attach separate page. Write contract # on top of page.

INSTRUCTIONS ON REVERSE SIDE

OMAP Contract #30464-2

AMENDMENT TO
FULLY CAPITATED HEALTH PLAN AGREEMENT

1. This contract is between the State of Oregon, acting by and through its Department of Human Resources, Office of Medical Assistance Programs, hereafter called "DIVISION", and

Multnomah County
DBA CareOregon
1500 SW 1st Ave., Ste. 250
Portland, OR 97201

hereafter called "CONTRACTOR".

2. This amendment is Amendment No. 2 to original contract number 30464. This amendment reflects a change in Attachment 1 (Oregon Health Plan Service Categories for Per Capita Costs) for FCHP Basic Services under the FCHP Service Categories for Capitation Rates section. Hospice care is included. Changes will be shown with old information in [brackets] and new information being underlined.
3. The FCHP BASIC SERVICES subcategory under FCHP SERVICE CATEGORIES FOR CAPITATION RATES shall be amended to read:

Inpatient Hospital - Basic

11.	Inpatient Hospital - Med/Surg	25
9.	Inpatient Hospital - Acute Detox	23
8.	<u>Hospice</u>	<u>22</u>

4. In performing the above, it is understood and agreed that all other terms and conditions of the original contract are still in effect.



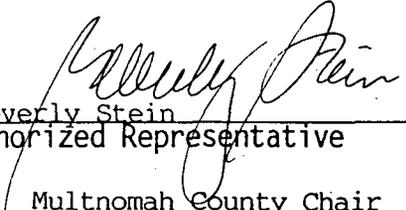
Barbara Roberts
Governor

500 Summer Street NE
Salem OR 97310-1014
Salem - (503) 378-2263
FAX - (503) 373-7689
TDD - (503) 378-6791

5. SIGNATURES

CONTRACTOR

STATE OF OREGON
OFFICE OF MEDICAL ASSISTANCE PROGRAMS
500 Summer St., N.E.
Salem, Oregon 97310-1014

By 
Beverly Stein
Authorized Representative
Title Multnomah County Chair
Date 2-17-94

By _____
Authorized Representative
Date _____

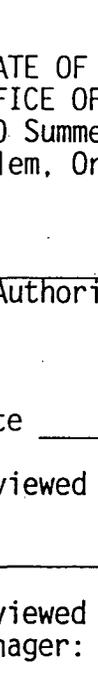
REVIEWED;

Reviewed by OMAP Contracts Manager:

Reviewed by OMAP Managed Care Program
Manager:

Laurence Kressel, County Counsel
for Multnomah County, Oregon

Reviewed by OMAP Asst. Director:

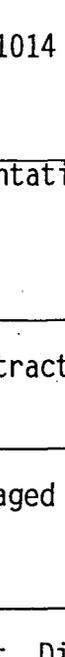
By 

Approved as to Legal Sufficiency:

Assistant Attorney General

Date 7 Feb 94

Associate Regional Administrator
Division of Medicaid
Health Care Financing Admin., Region 10
Dept. of Health & Human Services

APPROVED MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C-5 DATE 2-17-94

BOARD CLERK

FCHP BASIC SERVICES: (Cont.)

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Physician - Somatic Mental Health

- | | | |
|----|--|----|
| 6. | Physician Somatic Mental Health Visits | 17 |
|----|--|----|

Outpatient Hospital - Basic

- | | | |
|-----|---|----|
| 13. | Ambulatory Surgery Center - Other | 32 |
| 14. | Dialysis - Outpatient Hospital | 33 |
| 4. | Outpatient Hospital - Diagnostic X-Ray | 6 |
| 15. | Outpatient Hospital - Durable Medical
Equipment & Supplies | 35 |
| 4. | Outpatient Hospital - Lab | 8 |
| 12. | Outpatient Hospital - Other (Includes Facility) | 27 |
| 12. | Outpatient Hospital - Professional | 28 |
| 18. | Outpatient Hospital - Therapeutic X-Ray | 39 |
| 16. | PT/OT - Outpatient Hospital | 37 |
| 17. | Speech-Language Pathology - Outpatient Hospital | 38 |

Outpatient Hospital - Maternity

- | | | |
|-----|--|----|
| 12. | Outpatient Hospital - Maternity Professional | 26 |
| 12. | Outpatient Hospital - Maternity Other | 26 |

Outpatient Hospital - Somatic Chemical Dependency

- | | | |
|-----|---|----|
| 12. | Outpatient Hospital - Somatic Chemical
Dependency Professional | 28 |
| 12. | Outpatient Hospital - Somatic Chemical Dependency Other | 29 |

FCHP BASIC SERVICES: (Cont.)

Page

Outpatient Hospital - Somatic Mental Health

- | | | |
|-----|--|----|
| 12. | Outpatient Hospital - Somatic Mental Health Professional | 29 |
| 12. | Outpatient Hospital - Somatic Mental Health Other | 30 |

Prescription Drugs - Basic

- | | | |
|----|--|---|
| 5. | Prescription Drugs - Basic | 9 |
| 5. | Prescription Drugs - Outpatient Hospital Basic | 9 |

Inpatient Hospital - Basic

- | | | |
|-----|----------------------------------|----|
| 11. | Inpatient Hospital - Med/Surg | 25 |
| 9. | Inpatient Hospital - Acute Detox | 23 |
| 8. | Hospice | 22 |

Inpatient Hospital - Extended Care

- | | | |
|-----|------------------|----|
| 10. | Nursing Facility | 24 |
|-----|------------------|----|

Inpatient Hospital - Maternity, Newborn & Neonatal ICU

- | | | |
|-----|--------------------------------|----|
| 11. | Inpatient Hospital - Maternity | 25 |
| 11. | Inpatient Hospital - Newborn | 25 |

MEETING DATE: FEB 17 1994

AGENDA NO: C-6

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: Ratification of amendment #3 to agreement with the Office of Medical Assistance Programs.

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 5 minutes ;or less

DEPARTMENT: Health **DIVISION:** _____

CONTACT: Tom Fronk **TELEPHONE #:** 4274
BLDG/ROOM #: 160/7

PERSON(S) MAKING PRESENTATION: Tom Fronk or Mary Henrich

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

This is amendment #3 to the agreement with the Office of Medical Assistance Programs. This is a house keeping item. It reflects a decrease in the states designated service areas and a resultant reduction in the per capitated rate in those areas. The areas reduced include Jackson and Josephine Counties.

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

OR

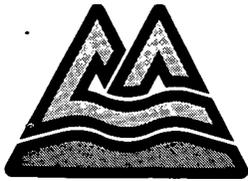
DEPARTMENT MANAGER: Billi Odgaard

BOARD OF
COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1994 FEB - 8 AM 10:30

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Sent Originals to Jim Kennedy on 2-17-94.*



MULTNOMAH COUNTY OREGON



HEALTH DEPARTMENT
426 S.W. STARK STREET, 8TH FLOOR
PORTLAND, OREGON 97204-2394
(503) 248-3674
FAX (503) 248-3676
TDD (503) 248-3816

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Beverly Stein, Multnomah County Chair

From: *B. Odegaard*
B. Odegaard, Health Department Director

REQUESTED PLACEMENT DATE: February 17, 1994

DATE: February 7, 1994

SUBJECT: Amendments #1 and #3 to Intergovernment Agreement with Oregon Medical Assistance Program (OMAP).

I. Recommendation/Action Requested: The Health Department recommends approval of amendments #1 and #3 to intergovernmental agreement with OMAP for period February 1, 1994 through September 30, 1994. These amendments were received in this office January 31, 1994.

II. Background/Analysis: These amendments are in direct support of CareOregon. These amendments delete certain counties from the state's designated service areas; reduces certain select health services from the fully capitated health plan (FCHP) and makes them fee-for-service, and reduces the capitation rate due to the reduction in the FCHP.

III. Financial Impact: The change from capitated rate to fee-for-service for certain select services will not have any measurable impact on CareOregon's budget.

IV. Legal Issues: none

V. Controversial Issues: none.

VI. Link to Current County Policies: This agreement is in direct support of CareOregon. The County Board passed a resolution in December, 1993 in support of CareOregon.

VII. Citizen Participation: none.

VIII. Other Government Participation: OMAP is a division of the Oregon Department of Human Resources. Clackamas County Health Department and OHSU are participating in CareOregon.



CONTRACT APPROVAL FORM
(See Administrative Procedure #2106)

MULTNOMAH COUNTY OREGON

Contract # 201744

Amendment # 3

<p>CLASS I</p> <input type="checkbox"/> Professional Services under \$25,000	<p>CLASS II</p> <input type="checkbox"/> Professional Services over \$25,000 (RFP, Exemption) <input type="checkbox"/> PCRB Contract <input type="checkbox"/> Maintenance Agreement <input type="checkbox"/> Licensing Agreement <input type="checkbox"/> Construction <input type="checkbox"/> Grant <input type="checkbox"/> Revenue	<p>CLASS III</p> <input checked="" type="checkbox"/> Intergovernmental Agreement APPROVED MULTNOMAH COUNTY BOARD OF COMMISSIONERS AGENDA # C-6 DATE 2/17/94 Carrie A. Parkerson BOARD CLERK
--	--	---

Department Health Division _____ Date February 7, 1994

Contract Originator Jim Kennedy Phone 6747 Bldg/Room 160/8

Administrative Contact Tom Fronk Phone 4274 Bldg/Room 160/7

Description of Contract This amendment reflects a decrease in designated service areas with a resultant reduction in per capita rate in those areas. It reduces Jackson and Josephine Counties

RFP/BID # _____ Date of RFP/BID _____ Exemption Exp. Date _____

ORS/AR # _____ Contractor is MBE WBE ORF

Contractor Name Office of Medical Assistance
 Mailing Address 500 Summer St NE
Salem, Oregon 97210
 Phone 378-2263
 Employer ID# or SS# _____
 Effective Date February 1, 1994
 Termination Date September 30, 1994
 Original Contract Amount \$ req
 Total Amount of Previous Amendments \$ req
 Amount of Amendment \$ req
 Total Amount of Agreement \$ req

Remittance Address _____
 (If Different) _____
 Payment Schedule _____ Terms _____
 Lump Sum \$ _____ Due on receipt
 Monthly \$ _____ Net 30
 Other \$ _____ Other _____
 Requirements contract - Requisition required.
 Purchase Order No. _____
 Requirements Not to Exceed \$ _____

REQUIRED SIGNATURES:

Department Manager Billi Odgaard
 Purchasing Director _____
 (Class II Contracts Only)
 County Counsel _____
 County Chair / Sheriff _____
 Contract Administration _____
 (Class I, Class II Contracts Only)

Encumber: Yes No
 Date 2/7/94
 Date _____
 Date Feb 94
 Date 2/17/94
 Date _____

VENDOR CODE		VENDOR NAME							TOTAL AMOUNT	\$	
LINE NO.	FUND	AGENCY	ORGANIZATION	SUB ORG	ACTIVITY	OBJECT/ REV SRC	SUB OBJ	REPT CATEG	LGFS DESCRIPTION	AMOUNT	INC/ DEC IND
01.	156	015	0650						OMAP	req	
02.											
03.											

* If additional space is needed, attach separate page. Write contract # on top of page.

OMAP Contract #30464-3

AMENDMENT TO
FULLY CAPITATED HEALTH PLAN AGREEMENT

1. This contract is between the State of Oregon, acting by and through its Department of Human Resources, Office of Medical Assistance Programs, hereafter called "DIVISION", and

Multnomah County
DBA CareOregon
1500 SW 1st Ave., Ste. 250
Portland, OR 97201

hereafter called "CONTRACTOR".

2. This amendment is Amendment No. 3 to original contract number 30464. This amendment reflects a decrease in the designated Service Areas in the 1. Status of Contractor section with a resultant change in the 5. Consideration section. This decrease is in addition to the changes in Amendment No. 1. Changes will be shown with old information in [brackets] and new information being underlined.
3. The 1. STATUS OF CONTRACTOR shall be amended to read:

Contractor's maximum enrollment limit is:

53,500 for Multnomah, Clackamas, and
Washington Counties,
8,000 for Linn, Benton, Marion, Polk, and
Yamhill Counties,
1,200 for Lane County
[4,800 for Jackson and Josephine
Counties,] and
[8,400] 7,000 for Klamath, [Malheur,]
Umatilla, and Union Counties.

Contractor's total maximum enrollment limit for all service areas is [75,900] 69,700 under this Agreement.

4. The 5. CONSIDERATION Section A.(1) shall be amended to read:

(d) Service Area: Jackson and Josephine Counties

\$ 92.84	for OHP Eligibles
\$559.20	for PLM Adults
\$137.38	for PLM Children
\$277.55	for GA Recipients]



Barbara Roberts
Governor

[(e)] (d) Service Area: Other counties, as identified on Page 1

5. In performing the above, it is understood and agreed that all other terms and conditions of the original contract are still in effect.

6. SIGNATURES

CONTRACTOR

STATE OF OREGON
OFFICE OF MEDICAL ASSISTANCE PROGRAMS
500 Summer St., N.E.
Salem, Oregon 97310-1014

By *Beverly Stein*
Beverly Stein
Authorized Representative
Title Multnomah County Chair

By _____
Authorized Representative

Date 2-17-94

Date _____

Reviewed by OMAP Contracts Manager:

REVIEWED:

Laurence Kressel, County Counsel
for Multnomah County, Oregon

Reviewed by OMAP Managed Care Program
Manager:

by *[Signature]*

Reviewed by OMAP Asst. Director:

date 7 Feb 94

Approved as to Legal Sufficiency:

Assistant Attorney General

APPROVED MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA# C-6 DATE 2-17-94
Cristi A. Patterson
BOARD CLERK

Associate Regional Administrator
Division of Medicaid
Health Care Financing Admin., Region 10
Dept. of Health & Human Services

MEETING DATE: FEB 17 1994

AGENDA NO: C-7

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: Ratification of agreement with Clackamas County Public Health Division

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 5 minutes or less

DEPARTMENT: Health **DIVISION:** _____

CONTACT: Tom Fronk **TELEPHONE #:** 4274

BLDG/ROOM #: 160/7

PERSON(S) MAKING PRESENTATION: Tom Fronk or Mary Lou Henrich

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

[Faint signature]

Clackamas County Public Health Division agrees to become a primary care provider under CareOregon, and to accept reimbursement on a capitated rate basis.

BOARD OF
CLACKAMAS COUNTY
OREGON
1994 FEB - 8 11 10 32

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

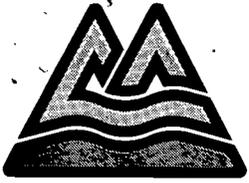
OR

DEPARTMENT MANAGER: Belli Odegaard

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Sent Originals to Jim Kennedy on 2-17-94*



MULTNOMAH COUNTY OREGON



HEALTH DEPARTMENT
426 S.W. STARK STREET, 8TH FLOOR
PORTLAND, OREGON 97204-2394
(503) 248-3674
FAX (503) 248-3676
TDD (503) 248-3816

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Beverly Stein, Multnomah County Chair

FROM:  Bill Odegaard, Health Department Director

REQUESTED PLACEMENT DATE: February 17, 1994

DATE: February 7, 1994

SUBJECT: Intergovernmental agreement with Clackamas County on behalf of CareOregon

I. Recommendation/Action: The Health Department recommends approval of this intergovernmental agreement for the period upon execution through 90 days written notice. This agreement was received in this office February 1, 1994.

II. Background/Analysis: Clackamas County Health Department agrees to become a primary care provider under CareOregon, and agrees to accept reimbursement on a capitated rate basis.

III. Financial Impact: The expenditures in this agreement are reimbursed to CareOregon through its agreement with the Office of Medical Assistance Programs which is operating the Oregon Health Plan.

IV. Legal Issues: none.

V. Controversial Issues: none.

VI. Link to Current County Policies: This agreement is in direct support of CareOregon. The County Board passed a supporting resolution in December, 1993.

VII. Citizen Participation: none.

VIII. Other Government Participation: Oregon Department of Human Resources and OHSU are also participating in CareOregon



CONTRACT APPROVAL FORM

(See Administrative Procedure #2106)

MULTNOMAH COUNTY OREGON

Contract # 201974

Amendment # _____

<p style="text-align: center;">CLASS I</p> <input type="checkbox"/> Professional Services under \$25,000	<p style="text-align: center;">CLASS II</p> <input type="checkbox"/> Professional Services over \$25,000 (RFP, Exemption) <input type="checkbox"/> PCRB Contract <input type="checkbox"/> Maintenance Agreement <input type="checkbox"/> Licensing Agreement <input type="checkbox"/> Construction <input type="checkbox"/> Grant <input type="checkbox"/> Revenue	<p style="text-align: center;">CLASS III</p> <input checked="" type="checkbox"/> Intergovernmental Agreement <p style="text-align: center;">APPROVED MULTNOMAH COUNTY BOARD OF COMMISSIONERS AGENDA # <u>C-7</u> DATE <u>2/17/94</u> <u>Carrie A. Parkerson</u> BOARD CLERK</p>
--	--	--

Department HSe Health Division _____ Date February 7, 1994

Contract Originator Jim Kennedy Phone 6747 Bldg/Room 160/8

Administrative Contact Tom Fronk Phone 4274 Bldg/Room 160/7

Description of Contract Clackamas County Health Department agrees to become a primary
care provider under CareOregon and agrees to accept reimbursement on a
capitated rate basis

RFP/BID # _____ Date of RFP/BID _____ Exemption Exp. Date _____

ORS/AR # _____ Contractor is MBE WBE QRF

Contractor Name Clackamas County
 Mailing Address 710 Center Street
Oregon City 97045-4093
 Phone 655-8430
 Employer ID# or SS# _____
 Effective Date date of execution
 Termination Date 90 days written notice
 Original Contract Amount \$ requirements
 Total Amount of Previous Amendments \$ requirements
 Amount of Amendment \$ _____
 Total Amount of Agreement \$ requirements

Remittance Address _____
(If Different)

Payment Schedule _____ Terms _____

Lump Sum \$ _____ Due on receipt
 Monthly \$ _____ Net 30
 Other \$ _____ Other _____
 Requirements contract - Requisition required.
 Purchase Order No. _____
 Requirements Not to Exceed \$ _____

REQUIRED SIGNATURES:

Department Manager [Signature]
 Purchasing Director (Class II Contracts Only) [Signature]
 County Counsel [Signature]
 County Chair / Sheriff [Signature]
 Contract Administration (Class I, Class II Contracts Only) _____

Encumber: Yes No
 Date 2/7/94
 Date _____
 Date 7 Feb 94
 Date 2/17/94
 Date _____

VENDOR CODE			VENDOR NAME						TOTAL AMOUNT \$		
LINE NO.	FUND	AGENCY	ORGANIZATION	SUB ORG	ACTIVITY	OBJECT/ REV SRC	SUB OBJ	REPT CATEG	LGFS DESCRIPTION	AMOUNT	INC/ DEC IND
01.	156	015			6110				OMAP	req	
02.											
03.											

* If additional space is needed, attach separate page. Write contract # on top of page.

PRIMARY CARE SERVICES AGREEMENT

Between

CareOregon

and

Clackamas County

(Provider)

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PRIMARY CARE SERVICES AGREEMENT

Between: **CareOregon** "CareOregon"
1500 SW First Avenue, Suite 250
Portland, OR 97201-5831

And: _____ "Provider"

Dated _____, 1993

BACKGROUND

A. "CareOregon" is an assumed business name of Multnomah County, Oregon. The Multnomah County Health Department administers CareOregon. CareOregon is authorized to provide managed health care services for Oregon Medicaid recipients.

B. Provider is (an Oregon _____ corporation/an Oregon partnership/_____) that provides primary care services through licensed practitioners.

C. This Primary Care Services Agreement sets forth the terms under which Provider will contract with CareOregon to provide certain primary care health services to Oregon Medicaid recipients.

AGREEMENT

1. Definitions

Whenever used in this Agreement, the following terms shall have the meanings set forth below:

1.1 "Capitation Payment" means the amount CareOregon pays to Provider on a per Member, per month basis in accordance with Section 6.1 as set forth on Exhibit A.

1.2 "CareOregon Policies" means the policies, procedures, protocols, forms and guidelines (including but not limited to grievance procedures, quality assurance protocols,

utilization management protocols, and credentialing procedures) adopted from time to time by CareOregon.

1.3 "CareOregon" is defined in Recital A above.

1.4 "Covered Services" means those Medically Appropriate services and supplies specified in OAR 410-141-480, Oregon Health Plan Benefit Package of Covered Services, together with the optional services CareOregon has undertaken to provide under the OMAP Agreement. The term "Covered Services" may be expanded, limited or otherwise changed pursuant to the OMAP Agreement and OMAP Rules.

1.5 "Emergency Services" means Covered Services that are needed immediately or appear to be needed immediately because of an injury or sudden illness. Covered Services provided by an appropriate source other than a Participating Provider are considered Emergency Services if the time required to reach a Participating Provider would have meant risk of permanent damage to the Member's health. These services are considered to be Emergency Services as long as transfer of the Member to a Participating Provider is precluded because of risk to the Member's health or because transfer would be unreasonable, given the distance involved in the transfer and the nature of the medical condition. If the definition of "Emergency Services" in OAR-141-000(17) is amended, the foregoing definition shall be amended accordingly.

1.6 "Fee-For-Service Payment" means a fee-for-service payment based on the CareOregon fee-for-service rate schedule set forth in Exhibit A for any Covered Services that are provided to a Member after the Member's Stop-Loss Deductible has been reached.

1.7 "Medical Director" means the physician licensed by the Oregon Board of Medical Examiners ("BME") who serves as the medical director of CareOregon, or his or her so licensed designee.

1.8 "Medically Appropriate" means services and medical supplies which are required for prevention, diagnosis or treatment for sickness or injury and which are:

1.8.1 consistent with the symptoms of a medical condition or treatment of a medical condition;

1.8.2 appropriate with regard to standards of good medical practice and generally recognized by the medical scientific community as effective;

1.8.3 not solely for the convenience of the Member or a provider of the service or medical supplies; and

1.8.4 the most cost effective of the alternative levels of service or medical supplies which can be safely provided to the Member in Provider's judgment.

1.9 "Medical Card" means the identification card issued by OMAP upon determination of eligibility, specifying the managed care plan or practitioner with which the recipient is enrolled.

1.10 "Member" means an individual who is found eligible by an Oregon Department of Human Resources Division to receive services under one or more of the medical assistance programs administered by OMAP, who is enrolled with CareOregon, and who has selected or been assigned to Provider or a PCP as his or her "primary care provider."

1.11 "Non-Emergency Services" means those Covered Services which are not Emergency Services.

1.12 "OMAP" means the State of Oregon, acting by and through its Department of Human Resources, Office of Medical Assistance Programs.

1.13 "OMAP Agreement" means the Provider Services Agreement dated _____, 1993 between OMAP and CareOregon, as amended from time to time.

1.14 "OMAP Rules" means the administrative rules duly promulgated by OMAP under OAR Chapter 410.

1.15 "Participating Provider" means a health care professional, facility or supplier who has contracted with CareOregon to provide specified Covered Services to Members. Provider is a Participating Provider so long as this Agreement is in effect.

1.16 "PCP" means an individual primary care practitioner who is licensed to provide Primary Care Services and who is employed by, a partner in, or under contract with Provider.

1.17 "Primary Care Services" mean the subset of Covered Services to be provided by Provider to Members, as listed on Exhibit B.

1.18 "Provider" is defined in the heading.

1.19 "Provider Manual" means the manual described in Section 5.2 that is provided by CareOregon to participating Providers.

1.20 "Stop-Loss Deductible" means the per Member deductible amount set forth on Exhibit A.

2. Representations and Warranties

2.1 Representations and Warranties of Provider. Provider represents and warrants to CareOregon as follows:

2.1.1 If Provider is an entity, Provider is duly organized, existing and in good standing under and by virtue of the laws of the State of Oregon;

2.1.2 The execution, delivery and performance of this Agreement have been duly authorized by Provider;

2.1.3 The information submitted by Provider to CareOregon in connection with Provider's CareOregon credentials application is accurate and does not fail to state information which, under the circumstances, would make any of the disclosed information materially misleading or inaccurate; and

2.1.4 This Agreement has been validly executed and delivered on behalf of Provider, is enforceable against Provider in accordance with its terms, and does not conflict with any law, contract or judicial decision applicable to Provider.

2.2 Representations and Warranties of CareOregon. CareOregon represents and warrants to Provider as follows:

2.2.1 CareOregon is a valid operating department, division or similar component of Multnomah County, and Multnomah County is fully responsible for the activities of CareOregon;

2.2.2 CareOregon is authorized by law to engage in the activities contemplated by this Agreement, both within and without Multnomah County, Oregon;

2.2.3 The execution, delivery and performance of this Agreement have been duly authorized by the Multnomah County Board of Commissioners; and

2.2.4 This Agreement and the OMAP Agreement have been validly executed and delivered on behalf of CareOregon, are enforceable against CareOregon in accordance with their terms, and do not conflict with any law, county charter, contract or judicial decision applicable to Multnomah County.

3. Engagement

3.1 Primary Care Services. CareOregon hereby engages Provider as an independent contractor to provide or arrange for the provision of Primary Care Services to Members.

3.2 Limitation on Third Party Beneficiaries. This Agreement shall in no way be construed to provide any rights directly to Members or other persons who are not parties, except that Members may assert Section 6.10 hereof.

3.3 Superseding Requirements. This Agreement and the relationship between CareOregon and Provider is subject to the OMAP Agreement and OMAP Rules. If there is a conflict between the terms of this Agreement and the OMAP Agreement or OMAP Rules, the terms of the OMAP Agreement or OMAP Rules shall control.

4. Duties of Provider

4.1 Primary Care Services. Provider shall provide Primary Care Services within the scope of its practice and the practice and licenses of the PCPs to Members in the Service Area and shall supervise and coordinate other Covered Services for Members. Provider shall accept all Members for diagnosis and treatment. Members shall be treated without discrimination of any kind. Provider assumes full risk at the beginning of each Member's date of enrollment for all costs of Primary Care Services provided to each Member up to the Stop-Loss Deductible.

4.2 PCPs. Provider shall retain one or more PCPs who shall serve as the "primary care provider" for each Member. A PCP shall be responsible for supervising, coordinating and providing Medically Appropriate initial and primary care 24 hours per day seven days a week for each Member within Provider's scope of practice, and initiating referrals for Covered Services other than Primary Care Services and assuring the continuity of Medically Appropriate care.

4.3 Referrals. Provision of Non-Emergency Services by other than Provider shall be preauthorized by a referral in accordance with CareOregon Policies. The Covered Services to be rendered, the number and frequency of treatments, and the period during which services may be rendered shall all be as limited by the referral. Except with the written consent of the Medical Director, or as permitted by the CareOregon Policies, referrals are only permitted to Participating Providers and are not permitted for Primary Care Services.

4.4 Emergency Services. Provider may make referrals for Emergency Services to non-Participating Providers, if transport to a Participating Provider is not Medically Appropriate, but Provider shall notify the Medical Director immediately within normal business hours or otherwise within 48 hours of the referral for such Emergency Services.

4.5 Eligibility. Before providing Covered Primary Care Services (other than Emergency Services) to a Member, Provider shall determine that the Member possesses a facially valid and current Medical Card and supporting identification and that membership and enrollment are verified by CareOregon by telephone inquiry or other method authorized in the CareOregon Policies.

4.6 Standards. Provider shall:

4.6.1 Provide Primary Care Services in a manner which assures continuity and coordination of the health care services provided to each Member;

4.6.2 Conduct its practice and treat all Members using that degree of care, skill, and diligence which is used by ordinarily careful providers in the same or similar circumstances in the Provider's community or a similar community (*see* ORS 677.095);

4.6.3 Obtain and maintain, and require its employees, partners, agents and subcontractors rendering services under this Agreement to obtain and maintain, any and all

required licenses, certificates or qualifications, and give CareOregon immediate notice of the lapse, termination, cancellation, limitation, qualification or suspension of the same; and

4.6.4 Comply with all OMAP Rules and CareOregon Policies and with other applicable state and federal laws and regulations.

4.7 Name. Provider shall allow its name to be used in connection with CareOregon's communication with Members and potential Members.

4.8 Utilization Management and Quality Review. Provider shall cooperate with and participate in CareOregon's Utilization Management and Quality Review Program.

4.9 Miscellaneous Federal Laws. Provider shall comply with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act (42 U.S.C. 1857(h)), Section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency (EPA) regulations (40 C.F.R. Part 15), which prohibit the use of facilities included on the EPA List of Violating Facilities. Provider shall report any violations to OMAP, to the Department of Health and Human Services, and to the U.S. EPA Assistant Administrator for Enforcement (EN-329). Provider shall comply with other applicable federal law.

4.10 Energy Efficiency. Provider shall comply with any applicable mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with Energy Policy and Conservation Act (Title III, Part C, Pub. L. 94-165).

4.11 Equal Opportunity. To the extent applicable, Provider shall comply with Executive Order 11246, entitled "Equal Employment Opportunity," as amended by Executive Order 11375, and as supplemented in Department of Labor regulations (41 C.F.R. Part 60).

4.12 Advance Directives. Provider shall comply with the requirements of Oregon Revised Statutes, Chapter 127, as amended by the Oregon Legislative Assembly 1993, pertaining to advance directives.

4.13 Lobbying. Provider acknowledges that no federal appropriated funds have been paid or shall be paid, by or on behalf of Provider, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of federal contract, grant, loan, or cooperative agreement. Provider agrees that if any funds other than federal appropriated funds have been paid or shall be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee or a member of Congress in connection with this federal contract, grant, loan or cooperative agreement, Provider

shall complete and submit Standard Form-LLL "Disclosure Form to Report Lobbying," in accordance with its instructions.

4.14 Independent Contractors. Provider and its subcontractors, employees, and agents are performing the work under this Agreement as independent contractors and not as officers, employees, or agents of the state or Multnomah County as those terms are used in ORS 30.265.

5. Duties of CareOregon

5.1 General. CareOregon shall perform all administrative, accounting, member communication, enrollment and other functions necessary or appropriate for the administration of this Agreement.

5.2 Provider Manual. CareOregon shall supply Provider with a copy of the "Provider Manual" and periodic additions and changes thereto. The "Provider Manual" shall include copies of the CareOregon Policies, relevant provisions of the OMAP Rules and the OMAP Agreement, a list of Participating Providers, and any other documents necessary to guide Provider.

5.3 Enrollment. CareOregon shall process all Member data and shall help members select, or shall assign members to Provider who will function as a PCP.

5.4 Identification and Eligibility. CareOregon shall supply Members with a CareOregon identification card. Plan shall make available information regarding the current enrollment and form of benefit plans of Members. CareOregon shall pay Provider the Fee-For-Service Payment for those Covered Services provided to an individual in the event the individual does not have other third party health plan coverage and CareOregon incorrectly verifies prior to the provision of Covered Services that an individual with a certain name and birth date is a Member or is eligible for certain benefits.

5.5 Responsiveness. CareOregon shall maintain adequate personnel and facilities to provide timely telephone and written response, during normal business hours, to inquiries regarding eligibility, Covered Services, PCP assignment to Members, and prior authorization of written referrals.

5.6 Participating Providers. CareOregon shall contract with a panel of primary care, specialty, ancillary, inpatient and tertiary providers that is adequate to service the Member population. CareOregon shall publish and maintain a list of Participating Providers.

5.7 Credentialing. CareOregon shall adopt Provider Credentialing Guidelines, shall include them in the Provider Manual, and shall credential each PCP under those Guidelines. Any adverse credentialing action shall be taken only pursuant to those Guidelines.

5.8 Names. CareOregon shall assure that any registration necessary or desirable for the use of CAREOREGON and any other names or logos CareOregon uses (the "Names") as an assumed business name and service mark is filed and maintained and that CareOregon has

rights to use the Names for managed care services in Oregon. Provider may use the Names in connection with communication with Members and potential Members.

6. Provider Compensation

6.1 Capitation Payment. CareOregon shall pay Provider the Capitation Payment for each Member, beginning with the date of enrollment and ending with the date of disenrollment or the date the cost of Primary Care Services provided to the Member reaches the Stop-Loss Deductible, whichever is earlier. Where the date of enrollment or disenrollment is other than on the first day of a calendar month, the Capitation Payment shall be prorated as required by OMAP Rules and CareOregon Policies. CareOregon shall make Capitation Payments to Provider by the 15th day of the month to which such payments are applicable. CareOregon shall make retroactive Capitation Payments to Provider for newborns and any Members erroneously omitted from an enrollment listing. Such payments shall be made to Provider by the 15th day of the month after CareOregon processes the enrollment or error.

6.2 Fee-for-Service Payments. CareOregon shall pay to Provider, by the 60th day after a clean claim is received, Fee-For-Service Payments for Primary Care Services that are provided to a Member after the Member's Stop-Loss Deductible has been reached. Billing and payment for all fee-for-service claims shall be pursuant to CareOregon Policies.

6.3 Disenrollment and Stop Loss. If a Member is disenrolled, or if the Member's Stop-Loss Deductible has been reached, CareOregon may recoup or Provider shall refund to CareOregon any Capitation Payments received for the Member for any period after such date as Provider is notified of the disenrollment or the reaching of the Stop-Loss Deductible. Where such date occurs other than the first day of the month, the Capitation Payment for that month shall be prorated.

6.4 Conditions for Payment. CareOregon shall have no obligation to make Capitated Payments or Fee-For-Service Payments to Provider relating to an individual if:

6.4.1 Provider fails to verify an individual's eligibility for Primary Care Services in accordance with CareOregon Policies and the individual is not a Member;

6.4.2 Information provided to CareOregon by Provider is materially inaccurate, and CareOregon should later reasonably determine either that the individual was not eligible or the services were not Primary Care Services; or

6.4.3 The delivered services do not comply with this Agreement or with the quality of care and utilization standards adopted in the CareOregon Utilization Management and Quality Review Program.

6.5 Overpayments. Any payments received by Provider in breach of Section 6.4, and any other payments received by Provider from CareOregon to which Provider is not entitled under the terms of this Agreement, shall be considered an overpayment and shall be recovered

from Provider as an off set against future payments due, in accordance with OAR 410-120-740, or as otherwise provided by law.

6.6 Incentive Arrangements. CareOregon shall establish and Provider shall participate in incentive arrangements for specialty, ancillary and institutional services, as set forth in Appendix C.

6.7 Coordination of Benefits. CareOregon reserves the right to coordinate benefits with other health plans, insurance carriers, government agencies and CareOregon. CareOregon may release medical information to such other parties as necessary to accomplish the coordination of benefits in conformity with applicable confidentiality laws. Coordination of benefits shall not result in compensation in excess of the amount determined by this Agreement, except where state laws or regulations require the contrary. If Provider has knowledge that a Member has third party health insurance or health benefits or that either Member or Provider is entitled to payment by a third party, Provider shall immediately so advise CareOregon. CareOregon shall be entitled to a credit or refund for the exact amount of duplicate payment received by Provider. Provider shall follow CareOregon Policies, including referrals only to Participating Providers, even when other coverage is available to Member.

6.8 Effect of Payment; Non-Covered Services. The payments to Provider by CareOregon under this Section 6 shall compensate Provider and all persons providing Primary Care Services under or through Provider, including Provider's subcontractors, for the provision of Primary Care Services to Members. Services, supplies or equipment which are not Covered Services may be the responsibility of the Member, and Provider may bill and collect separately for those which are lawfully the responsibility of the Member. Payment by CareOregon shall not constitute a waiver of defenses.

6.9 Encounter Data. Provider shall submit to CareOregon encounter data for each contact with a Member. Provider shall submit encounter data at least once per calendar month. Provider shall use its best efforts to supply encounter data within 30 days after a contact, and shall in all cases supply encounter data no later than 60 days after a contact. Each encounter claim shall include such information as may be required by CareOregon Policies. Provider acknowledges that CareOregon is subject to additional costs and administrative fees for failure to submit encounter data in compliance with OMAP Rules. Provider shall indemnify CareOregon for any such costs or fees caused by Provider's failure to promptly deliver encounter data after reasonable notice of such failure.

6.10 Surcharges. Provider shall not charge, bill or attempt to collect from CareOregon or the Member for any charges incurred in connection with Primary Care Services, except for any copayment, deductible, or other surcharge allowed by the OMAP Rules ("Permitted Surcharge"). The agreement of a Member to the contrary shall not bind CareOregon. In no event, including, but not limited to nonpayment by CareOregon, CareOregon's insolvency or breach of this Agreement, shall Provider bill, charge, collect a deposit from, seek compensation, copayment, deductible, remuneration or reimbursement (other than a Permitted Surcharge) from, or have any recourse against OMAP, a Member or other person, other than CareOregon, for Primary Care Services. This provision shall not prohibit collection for non-Covered Services,

which have not otherwise been paid by a primary or secondary carrier in accordance with regulatory standards for coordination of benefits. In the event of CareOregon's insolvency, Provider shall continue to provide Primary Care Services to Members for the duration of the period for which CareOregon was paid a capitation payment by OMAP on behalf of the Member or until the Member's discharge from inpatient facilities, whichever is later.

7. Indemnity and Insurance

7.1 Stop Loss Insurance. CareOregon shall offer stop loss insurance limiting the financial responsibility of Provider for Covered Services rendered to any Member during the calendar year by Provider as shown in Schedule A, for Covered Services for which the Provider was responsible under terms of this Agreement and for Primary Care referrals (Section 4.3). The basis for calculation of the value of Covered Services for purposes of the stop loss deductible shall be the Fee-For-Service Payment. This section shall be satisfied by either a program of self-insurance by CareOregon or the availability of stop loss insurance from OMAP or an insurance company.

7.2 Indemnity.

7.2.1 Provider shall defend, indemnify, save and hold harmless CareOregon and OMAP, and each of their respective officers, agents and employees, from all damages, costs and liabilities, including attorney fees, arising out of all actions, suits or claims of whatsoever nature resulting from or arising out of the activities or omissions of Provider or its subcontractors, agents or employees, subject to the limitations of Oregon or federal law.

7.2.2 CareOregon shall defend, indemnify, save and hold harmless Provider, and its officers, partners, shareholders, agents and employees, from all damages, costs and liabilities, including attorney fees, arising out of all actions, suits or claims of whatsoever nature resulting from or arising out of the activities or omissions of CareOregon or any of its subcontractors, agents or employees, other than Provider or persons acting through Provider, subject to the limitations of Oregon law.

7.3 Liability Insurance. Provider shall obtain and keep in effect during the term of this Agreement professional liability insurance which provides coverage for direct and vicarious liability relating to any damages caused by any error, omission or negligent act of Provider (or any its partners, shareholders, officers and employees) in an amount not less than \$500,000 per person per incident and \$1 million in the aggregate. Such insurance shall be upon terms and with insurance carriers reasonably acceptable to CareOregon. Proof of insurance coverage is appended to this Agreement as Exhibit D. Provider shall provide proof of continued insurance coverage at least annually and upon request of CareOregon. CareOregon may accept Provider's self insurance or tort claims act protection in lieu of insurance on a case-by-case basis upon terms satisfactory to CareOregon.

7.4 Legal Claims.

7.4.1 Each party shall furnish, and shall require any person under contract with it to furnish, notice to any affected parties promptly after receipt of any claim or any threatened claim which might give rise to an obligation of indemnity under this Section 7.

7.4.2 Each party shall cooperate with the other parties and their respective insurance carriers in order to handle such claims as economically as possible.

7.5 Workers' Compensation. Provider shall maintain Workers' Compensation Insurance coverage for all nonexempt workers, employees, and subcontractors either as a carrier-insured employer or a self-insured employer as defined in ORS Chapter 656. Out-of-state employers or subcontractors shall provide Oregon Workers' Compensation coverage for their workers who work at a single location within Oregon for more than thirty (30) days in a calendar year. Contractors or subcontractors who perform work for Provider without the assistance or labor of any employee may file a statement with provider indicating this status. A certificate showing current Worker's Compensation Insurance is attached to this Agreement as Exhibit D and incorporated as a part of this Agreement.

8. Records and Confidentiality of Records

8.1 Maintenance. Provider shall maintain financial, medical and other records pertinent to this Agreement. All records other than medical records shall be retained by Provider for at least three years after final payment is made under this Agreement and all pending matters are closed. Additionally, if an audit, litigation or other action involving the records is started before the end of the three-year period, the records shall be retained until all issues arising out of the action are resolved. Provider shall maintain and retain medical records for at least four years after the date of service or for such longer length of time as may be dictated by generally accepted standards for record keeping, in accordance with OAR 410-141-180.

8.2 Access. At all reasonable times, Provider shall provide CareOregon, OMAP, the Health Care Financing Administration, the Comptroller General of the United States, the Oregon Secretary of State, and all of their duly authorized representatives the right of access to its facilities and to its financial and medical records which are directly pertinent to this Agreement. These records will be made available for the purpose of making audit, examination, excerpts and transcriptions, for purposes and in accordance with the processes authorized by law. Contractor shall, upon request, provide a reasonably available, suitable work area and (for a mutually agreeable charge) copying capabilities to facilitate such an audit or review.

8.3 Confidentiality. Subject to the requirements of applicable law, including 42 CFR Part 431, Subpart F, Provider and CareOregon shall not use, release or disclose any information concerning a member for any purpose not directly connected with the administration of this Agreement, except with the written consent of the Member, the Member's attorney or, if appropriate, the Member's parent or guardian. Provider shall maintain the confidentiality of medical records in accordance with applicable law, including ORS 433.045(3) with respect to HIV test information. Provider and CareOregon shall ensure that their agents, employees,

officers and subcontractors with access to the Member's records understand and comply with this confidentiality provision.

8.4 Survival. All of this Article 8 shall survive termination of this Agreement for a period of five years.

9. Grievance Procedures

9.1 Members. CareOregon shall maintain and publish procedures for hearing and responding to the grievances of Members and Participating Providers. Provider shall cooperate with such grievance procedures.

9.2 Sanctions. CareOregon may impose sanctions upon Provider for failing to comply with the terms of this Agreement in accordance with the CareOregon Policies. Such sanctions may include additional costs or administrative fees and temporary suspension of participation by Provider or one of its employees, partners, officers, or subcontractors.

10. Term and Termination

10.1 Effective Date and Term. This Agreement will be in effect on the date of execution. The initial term shall be the same as the term of the OMAP Agreement. This Agreement shall thereafter be automatically renewed for the renewal term of the OMAP Agreement.

10.2 Termination Without Cause. Either party may terminate this Agreement without cause by giving the other party written notice of termination of least 90 days prior to the effective termination date, which may be the last day of any month designated in the notice.

10.3 Termination by CareOregon with Cause. Following notice to Provider setting forth the specific grounds for termination or suspension, CareOregon may terminate or suspend this Agreement with immediate effect upon the occurrence of:

10.3.1 The lapse, relinquishment, suspension, expiration, cancellation or termination of any required license, certification or qualification of Provider or the lapse, relinquishment, suspension, expiration, cancellation or termination of Provider's insurance as required in Section 7.3;

10.3.2 The termination, suspension or expiration of the OMAP Agreement;

10.3.3 Provider's filing for protection under the U.S. Bankruptcy Code, the appointment of a receiver to manage Provider's affairs, or the judicial declaration that Provider is insolvent;

10.3.4 The discovery by CareOregon that the representations and warranties of Provider under Section 2.1 are materially inaccurate or the violation by

Provider of any material provision of this Agreement or the CareOregon Policies, if the same is not cured within 30 days after notice of the misrepresentation or violation; or

10.3.5 A danger posed by Provider to the health or safety of Members in the sole discretion of CareOregon.

Following any such suspension or termination, CareOregon's grievance or credentialing process will be available to resolve any dispute about the grounds for termination or suspension.

10.4 Termination by Provider With Cause. Following notice to CareOregon setting forth the specific ground for termination or suspension, Provider may terminate or suspend this Agreement with immediate effect upon the occurrence of:

10.4.1 The failure of CareOregon to make any payment required under this Agreement within 10 days after a notice from Provider that it is past due; or

10.4.2 The discovery by Provider that the representations and warranties of CareOregon in Section 2.1 are materially inaccurate or the violation by CareOregon of any material provision of this Agreement or the CareOregon Policies (other than the failure to make a payment), if the same is not cured within 30 days after notice of the misrepresentation or violation.

10.5 Transition. The parties shall continue to perform all of their duties and obligations with respect to Members then under the care of Provider to the date of termination. Provider shall be eligible for reimbursement under the terms of this Agreement during such period. Provider is entitled to receive all earned compensation to the date of termination.

10.6 Duties After Termination. Upon termination of this Agreement:

10.6.1 Provider shall ensure the orderly and reasonable transfer of Member care in progress;

10.6.2 If Provider continues to provide Primary Care Services after the date of termination, CareOregon shall make Fee-For-Service Payments if the former Member is a OMAP recipient and CareOregon qualifies for such payments from OMAP; and

10.6.3 There shall be a final accounting of payments due to or refunds payable by Provider.

10.7 Survival. The following provisions of this Agreement shall survive its termination: Sections 1, 2, 3.2, 7.2, 7.4, 8, 9, 10.6 and 11.3 to 11.7. Section 7 shall survive termination with respect to compensation for periods prior to termination.

11. Miscellaneous

11.1 Amendments. This Agreement and the CareOregon Policies may be amended in writing by CareOregon, and such amendment shall automatically become effective 31 days after written notice to Provider, unless specifically rejected by Provider in writing within 30 days of such written notice. Any other amendment requires written consent of Provider.

11.2 Assignment. Provider may not assign this Agreement or any of its obligations or rights hereunder without the written consent of CareOregon. CareOregon may assign this Agreement or any of its obligations or rights hereunder without the consent of Provider. In the event of any assignment by CareOregon to a person other than OHSU, such assignment shall automatically become effective upon notice to Provider, unless specifically rejected by Provider in writing within 30 days of such written notice; such a rejection by Provider shall terminate this Agreement. In the event of merger, consolidation or acquisition of either party, this Agreement shall be binding on the parties and any successors of the parties.

11.3 Integration. This agreement, including all Exhibits, constitutes the entire agreement between the parties pertaining to its subject matter, and supersedes all prior agreements and understandings of the parties.

11.4 Notices. All notices shall be in writing and shall be deemed delivered if personally delivered or dispatched by express, certified or registered mail, return receipt requested, addressed to the parties as set forth opposite their respective names below:

CareOregon: CareOregon
1500 SW First Avenue, Suite 250
Portland, OR 97201-5831
Attention: Plan Administrator

Provider: _____

Attention: _____

Notice shall be deemed given on the date it is personally delivered, or one day after the date it is dispatched by express, or three days after the date it is deposited in the U.S. Mail in accordance with the foregoing. Telefax notice shall be deemed delivered if receipt is acknowledged in writing. Either party may at any time change its address for notification purposes by mailing a notice as required above stating the change and setting forth the new address. The new address shall be effective on the date specified in such notice or if no date is specified, on the fifth (5th) day following the date such notice is received.

11.5 Severability. In case any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal or unenforceable in any respect, except in those instances where removal or elimination of such invalid, illegal or unenforceable provision or provisions would result in a failure of consideration under this Agreement, such

invalidity, illegality or unenforceability shall not affect any other provision hereof, and this Agreement shall be construed as if such invalid, illegal or unenforceable provision had never been contained herein.

11.6 Availability of Funds. CareOregon's liability under this Agreement is subject to the limitations and conditions of Oregon Constitution Article XI, Sections 9 (pertaining to limitations on powers of county to assist corporations) and 10 (pertaining to county debt limitation).

11.7 Governing Law. This Agreement shall be governed by the laws of the State of Oregon. The parties stipulate to jurisdiction and venue in the Oregon Circuit Court for the County of Multnomah for any actions under this Agreement.

IN WITNESS WHEREOF, the parties have executed this agreement to be effective as of the 20 day of January, 1994

Multnomah County, Oregon
doing business as CareOregon

CLACKAMAS COUNTY
Darlene Hooley
(Provider)

Chair: Darlene Hooley

By Beverly Stein

By Ed Lindquist

Title Multnomah County Chair

Title Commissioner

Approved as to form:

By Judie Hammerstad

Multnomah County Counsel

Title Commissioner

Approved as to form:

By [Signature]

By David W. Anderson

Title 7 Feb 94

Title Asst. County Counsel

APPROVED MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C-7 DAY 2-17-94
Cristina Pastorek
BOARD CLERK

EXHIBIT A

PAYMENT SCHEDULE

Provider: Clackamas County Public Health Division

1. Capitation Payment

The capitation payment for providing primary care services for CareOregon members will be as follows:

For members assigned to PCP's in Provider's facilities in Clackamas County:

<u>Eligibility category:</u>	<u>Rate per member, per month</u>
OHP eligibles under 100% Federal Poverty Level (FPL)	<u>\$12.78</u>
Poverty Level Medical Adults 100% to 133% FPL	<u>\$21.53</u>
Poverty Level Medical Children 100% to 133% FPL	<u>\$26.74</u>
General Assistance	<u>\$14.03</u>

(Above rates effective February 1, 1994)

2. Stop Loss

A primary care stop-loss insurance premium shall be deducted from the above per member, per month payments until the Provider's total enrollment level exceeds the numbers outlined below.

<u>Stop Loss Deductible</u>	<u>Stop Loss Premium OHP+GA+PLM Children</u>	<u>Stop Loss Premium PLM Adults</u>	<u>Total Enrollment Level</u>
\$1,000.00	\$1.00 pm/pm	\$1.25 pm/pm	1-100 members (mandatory)
\$1,500.00	\$0.44 pm/pm	\$0.82 pm/pm	101-500 members
\$2,000.00	\$0.10 pm/pm	\$0.30 pm/pm	101-500 members

Stop loss insurance is mandatory at the \$1,000 deductible level for Providers with 100 or fewer total members. Stop loss insurance is mandatory for Providers with enrollments from 101 to 500 total members, but the Provider has a choice of two deductible levels, as listed above. When enrollment exceeds 500 total members, CareOregon will no longer require or offer stop loss insurance to be provided by CareOregon. When your enrollment exceeds 100 total members you should notify CareOregon of the option/level you want. The choice of stop loss will be for a one year period or until Provider total membership exceeds 500.

3. Fee-For-Service Rate Schedule

As stated in Article 6, Fee-For-Service Payments shall be based upon the CareOregon fee-for-service rate schedule in effect on the dates of service.

Effective September 1, 1993, CareOregon will use Medicare's Resource Based Relative Value Scale (RBRVS) to establish its fee schedule for physician services.

CareOregon will use the Relative Value Unit (RVU) for physicians' work, overhead costs and professional liability insurance costs. We will not use Medicare's Geographic Adjustment Factor or Volume Performance Standard.

CareOregon's conversion factors for September 1, 1993 - June 30, 1994 are:

Code	Conversion Factor
All procedure codes except OB	\$23.75 per unit
OB codes	\$27.00 per unit

EXHIBIT B

SCOPE OF PRIMARY CARE SERVICES

1. Categories of Primary Care Service

Primary care has been defined as comprehensive, continuous, first contact care which focuses on preventive care and care of common conditions. Provider will be capitated for the following categories of Primary Care Service:

A. Preventive services, health maintenance and disease screening such as:

1. Well child care
2. Immunizations
3. Blood pressure screening
4. Physical exams

B. Management of common chronic primary care problems such as:

1. Diabetes
2. Hypertension
3. Chronic lung disease
4. Asthma
5. Arthritis
6. Seizure disorders
7. Peptic ulcer disease
8. Ischemic heart disease
9. Other similar conditions managed in the office

C. Management of common acute primary care problems such as:

1. Respiratory infections
2. Urinary infection
3. Gastroenteritis
4. Acute musculoskeletal strains, sprains and contusions
5. Vaginitis
6. Hemorrhoids
7. Depression
8. Anxiety disorders
9. Other similar conditions managed in the office

D. Coordination of care including such services as:

1. Choosing and communicating with consultants
2. Arranging and coordinating hospital care when provided by a consultant

- including participating in discharge planning
- 3. Efficient referral for special care needs

E. Common outpatient procedures such as:

- 1. Suturing of lacerations
- 2. Splinting and taping of injuries
- 3. Phlebotomy
- 4. Bladder catheterization

F. Primary office laboratory including all lab tests listed as waived by CLIA

G. Emergency care including professional fees for emergent and after hours visits

2. Examples of Non-Primary Care Services

The primary care provider is responsible for managing the entire professional service needs of the patient/client. This means that utilization of resources for professional services is the responsibility of the primary care provider including services which are not included within the primary care capitation payment. The following services will be paid for on a fee-for-service basis by CareOregon and may be provided by either the primary care provider or by a consultant after authorized referral from the primary care provider:

- A. Inpatient physician care
- B. Obstetric care including prenatal care
- C. Non-primary laboratory including all lab tests not waived by the CLIA regulations
- D. Radiology services including Xray interpretation
- E. Consultant care
- F. Home and nursing home visits including hospice care
- G. Prescription drugs including medications dispensed from the office
- H. More complicated outpatient procedures such as:
 - 1. ECG tracing and interpretation
 - 2. Spirometry
 - 3. Fracture care including casting
 - 4. Colposcopy
 - 5. Endometrial Biopsy
 - 6. Norplant or IUD insertion

7. Sigmoidoscopy
8. Vasectomy

I. Family Planning (payable by OMAP)

EXHIBIT C

INCENTIVE ARRANGEMENTS

To be provided following approval by the CareOregon Advisory Board.

EXHIBIT D

PROOF OF LIABILITY INSURANCE AND WORKERS COMPENSATION INSURANCE

WORKERS' COMPENSATION

County is an insured employer for purposes of the Oregon Workers' Compensation law (ORS Chapter 656) and is solely liable for any Workers' Compensation coverage under this contract. County shall maintain at all times during the term of this contract workers' compensation coverage of its employees while carrying out employee duties under this contract.

LIABILITY INSURANCE

County, pursuant to applicable provisions of ORS 30.260 to 30.300 (as now or hereafter amended), is self-insured for its tort liabilities. Pursuant to ORS 30.260 through 30.300, County and its employees are insured against any claim or claims for damages arising by reason of personal injuries or death occasioned directly or indirectly in connection with the performance of, or failure to perform, and County service provided hereunder, the use of any property and facilities provided by County, and activities performed by County in connection with the contract. A letter certifying County's insurance shall be provided upon request.

MEETING DATE: FEB 17 1994

AGENDA NO: R-1

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: RESOLUTION in the Matter of Designating the Multnomah County Sheriff as the Person in Charge of County Premises for Purposes of Excluding Members of the Public and Enforcement of Trespass Laws

BOARD BRIEFING: Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 10 minutes

DEPARTMENT: Sheriff's Office DIVISION: _____

CONTACT: Larry Aab TELEPHONE #: 251-2489
BLDG/ROOM #: 313/231

PERSON(S) MAKING PRESENTATION: Bob Skipper, Sheriff

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

SIGNATURES REQUIRED:

RESOLUTION in the Matter of Designating the Multnomah County Sheriff as the Person in Charge of County Premises for Purposes of Excluding Members of the Public and Enforcement of Trespass Laws.

REGULAR

ELECTED OFFICIAL: Bob Skipper

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 Copy of Resolution 94-25 sent to Larry Aab, Larry Banta & Duayne George on 2-17-94. 6/93

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1994 FEB 10 AM 11:56

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

In the Matter of Designating)
The Multnomah County Sheriff)
As the Person in Charge of) RESOLUTION
County Premises for Purposes of) 94-25
Excluding Members of the Public)
and Enforcement of Trespass Laws)

WHEREAS, state criminal trespass laws (ORS 164.205), as interpreted by court decision, provide that a person may be lawfully excluded from premises open to the public, or prosecuted upon refusal to comply with such exclusion order, only if such person is lawfully excluded from the premises by an authorized person in charge of the premises, and

WHEREAS, ORS 164.205(5) provides that a "person in charge" includes the person, or holder of a position, designated as the person or position-holder in charge by the board, commission or governing body of any political subdivision of this state, and

WHEREAS, Multnomah County is a political subdivision of this state and pursuant to § 3.10 of its Home Rule Charter, the Board of County Commissioners is its governing body, and

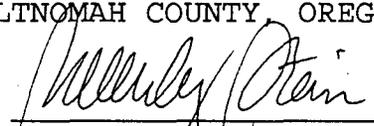
WHEREAS, the Board of County Commissioners desires to protect the citizens and property of the County from persons who unlawfully enter or remain in or upon County premises.

THEREFORE IT IS RESOLVED that the Board of County Commissioners of Multnomah County designates the Multnomah County Sheriff, and such personnel as the Sheriff may subsequently designate, as the person in charge of County premises for the purposes of excluding members of the public from, and enforcement of state criminal trespass laws in or upon County premises.

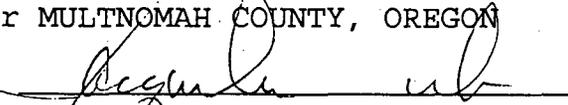
APPROVED this 17th day of February, 1994.

MULTNOMAH COUNTY, OREGON

By


Beverly Stein
Multnomah County Chair

REVIEWED:
LAWRENCE KRESSEL, COUNTY COUNSEL
for MULTNOMAH COUNTY, OREGON

By 

PLEASE PRINT LEGIBLY!

MEETING DATE 2-17-94

NAME Steven Marks - Attorney

ADDRESS _____

STREET _____

CITY _____

ZIP CODE _____

I WISH TO SPEAK ON AGENDA ITEM # R-2

SUPPORT _____

OPPOSE _____

SUBMIT TO BOARD CLERK

MEETING DATE: FEB 17 1994

AGENDA NO: R-2

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: CONSIDERATION OF SETTING A HEARING DATE ON APPEAL OF GREG DURHAM

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: 2/17/94

Amount of Time Needed: 15 minutes

DEPARTMENT: Nondepartmental DIVISION: County Chair's Office

CONTACT: Chip Lazenby TELEPHONE #: X-3138
BLDG/ROOM #: 106/1410

PERSON(S) MAKING PRESENTATION: Pete Kasting, Larry Kressel

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

In the Matter of Consideration of Setting a Hearing Date

1994 FEB 10 AM 8:18
MULTI-COUNTY
OREGON
COUNTY CLERK'S OFFICE

SIGNATURES REQUIRED:

ELECTED OFFICIAL: *Dorothy Allen*

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Hearing Set for 3-3-94 w/15 min per side, TC 11:00 am*

M E M O R A N D U M

TO: Pete Kasting, City Attorney's Office
FROM: Laurence Kressel (106/1530) *LK*
County Counsel
DATE: February 3, 1994
SUBJECT: Durham Appeal to BCC (Adult Foster Care License Case)

Thanks for agreeing to serve as counsel to the BCC in this appeal.

As we discussed, I enclose copies of the relevant code and administrative rule provisions on adult foster care. Also enclosed are (1) appellant's notice of appeal (he was supposed to file "exceptions" to the Hearings Officer report, but he filed only the enclosed), (2) the agency's response and (3) an agenda placement form for scheduling the appeal at the BCC.

Deb Bogstad, the Board Clerk (248 3277), expects a call from you to set up a hearing date and to arrange for filing the agenda placement form. She can give you alternative dates that are available.

Thanks again.

cc: Deb Bogstad
Chip Lazenby

BOARD OF
COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1994 FEB - 3 PM 4: 20



MULTNOMAH COUNTY OREGON

DEPARTMENT OF SOCIAL SERVICES
AGING SERVICES DIVISION (503) 248-3646
ADULT CARE HOME PROGRAM (503) 248-3000
421 S.W. 5TH, ROOM 405
PORTLAND, OREGON 97204-2221

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Clerk of the Board of County Commissioners
FROM: Stephen P. Balog, Manager *SB*
Adult Care Home Program
DATE: February 1, 1994
SUBJECT: Appeal of Mr. Greg Durham

1994 FEB - 2 AM 10:05
MULTNOMAH COUNTY
OREGON
CLERK OF BOARD OF
COUNTY COMMISSIONERS

This written rebuttal to the appeal of Greg Durham is filed pursuant to MCAR 890-090-430.

The agency has reviewed the appeal and determined that the appeal seeks review of the entire ruling of the Hearings Officer. (Copy attached).

After two days of testimony, the Hearings Officer determined that there were violations of the Adult Care Home Rules which were "serious, substantial and intentional". Mr. Durham clearly violated the Rules by taking more than 5 residents into his home. During the hearing he admitted doing so. This is a clear and significant violation of Care Home Rules. The Hearings Officer specifically found that Durham intentionally violated this rule by ignoring his "obligation to either refuse to admit this sixth resident or to seek appropriate waivers or approvals from the Adult Care Home Program...He did neither and, instead, accepted the sixth resident in violation of the rules".

Durham also violated the rules by taking residents outside the restrictions placed on types of residents that he was authorized to care for as a condition of being licensed. In this violation he accepted elderly residents knowing that his license specifically barred him from serving such clients. In fact, Durham had requested exception that would allow him to serve elderly and those requests were denied. He proceeded to accept the residents anyway.

In addition to these violations of the rules, it was clear from the evidence introduced at the hearing that Durham took steps to conceal these violations from the Adult Care Home Program. The Hearings Officer's conclusion that Durham was "less than

forthright with the Manager and his staff" is charitably understated.

The agency believes that revocation of this license was an appropriate sanction and concurs with the reasoning of the Hearings Officer. There is little factual dispute in the record concerning the violations or Mr. Durham's duplicitous behavior. The decision of this office, which was sustained by the Hearings Officer, should be upheld.

c. H.H. Lazenby, County Counsel
Jeff Bennett, Attorney at Law
William Shatzer, Hearings Officer
Greg Durham



CITY OF

PORTLAND, OREGON

HEARINGS OFFICE

1120 S.W. 5th Avenue, Room 1017
Portland, Oregon 97204-1960

Elizabeth A. Normand, Land Use Hearings Officer
(503) 823-7719

William W. Shatzer, Code Hearings Officer
(503) 823-7307

FAX (503) 823-5370

RECEIVED

DEC 30 1993

HEARINGS OFFICER'S ORDER

ADULT CARE HOME PROGRAM

APPEAL OF GREG DURHAM

HEARING NO. 134022

DATE OF HEARING: December 16 and 17, 1993

APPEARANCES:

Mr. Greg Durham, appellant, personally and by his attorney, Mr. Jeffrey S. Bennett

Mr. H. H. Lazenby, Jr., Deputy County Counsel

HEARINGS OFFICER: Mr. William W. Shatzer

FINDINGS OF FACT AND CONCLUSIONS OF LAW:

This is an appeal from a determination by the Director of the Multnomah County Adult Care Program revoking the Adult Care Home License of the appellant, Mr. Durham. The Director determined that the license holders had violated the provisions of MCAR 890-020-120 (c) by having more than five residents in the home and had violated a condition of the license by admitting non-DD and non-DSO residents to the home.

The factual issues in this proceeding are not difficult to resolve. By the appellant's own admission, he admitted a sixth resident to his adult care home without first obtaining an appropriate waiver or approval of the Multnomah County Adult Care Program and maintained that additional resident in his adult care home for a period of 61 days in violation of MCAR 890-020-1209 (c).

While appellant claims he was somehow pressured or misled by social workers for Multnomah County into accepting this additional resident, it is clear that these County employees were uninformed or misinformed as to the actual number of residents in the home at the time they requested Mr. Durham to accept the new resident. Mr. Durham, conversely, knew exactly how many residents he had. Clearly he had the obligation to either refuse to admit this sixth resident or to seek appropriate waivers or approvals from the Adult Care Program to accept the additional resident. He did neither and, instead, accepted the sixth resident in violation of MCAR 890-020-120(c).

FROM: LAZENBY Chip H

TO: BOGSTAD Deborah L

DATE: 01-29-94

TIME: 15:14

CC: KRESSEL Larry

SUBJECT: Greg Durham Appeal

PRIORITY:

ATTACHMENTS:

The appeal letter I received was dated January 13 and not recieved by this office until January 14. Under Balog's rules we have 20 days to file a rebuttal. I think this gives Balog until February 3 to make a filing. Because I advised and represented Adult Care Home Program during this hearing, Larry has decided to advise the Board on the procedure in this matter. Please contact him to see if this complies with the rules. I plan to have the agency response to you by Tueday February 1.
=====

BOARD OF
COUNTY COMMISSIONERS
1994 FEB - 1 AM 10:41
MULTNOMAH COUNTY
OREGON

1-13-74

To The Clerk of The Multnomah County
Board of County Commissioners,

We, Greg Durlan & Betty Clemence,
DBA Caring Hearts Adult Foster Care,
would like this letter to be our notice
that we would like to appeal hearings
Officer Statzer's decision to revoke our
license to provide foster care, hearing
no: 134022. Thank you.

BOARD OF
COUNTY COMMISSIONERS
1994 JAN 14 AM 9:58
MULTNOMAH COUNTY
OREGON

Sincerely,
Greg Durlan

5027 NE 19th Ave.
Portland Or 97211
503-284-7694

cc: Steve Batoca
CHIP LAZENBY



CITY OF
PORTLAND, OREGON

HEARINGS OFFICE

1120 S.W. 5th Avenue, Room 1017
Portland, Oregon 97204-1960

Elizabeth A. Normand, Land Use Hearings Officer
(503) 823-7719

William W. Shatzer, Code Hearings Officer
(503) 823-7307

FAX (503) 823-5370

HEARINGS OFFICER'S ORDER

APPEAL OF GREG DURHAM

HEARING NO. 134022

DATE OF HEARING: December 16 and 17, 1993

APPEARANCES:

Mr. Greg Durham, appellant, personally and by his attorney, Mr. Jeffrey S. Bennett

Mr. H. H. Lazenby, Jr., Deputy County Counsel

HEARINGS OFFICER: Mr. William W. Shatzer

FINDINGS OF FACT AND CONCLUSIONS OF LAW:

This is an appeal from a determination by the Director of the Multnomah County Adult Care Program revoking the Adult Care Home License of the appellant, Mr. Durham. The Director determined that the license holders had violated the provisions of MCAR 890-020-120 (c) by having more than five residents in the home and had violated a condition of the license by admitting non-DD and non-DSO residents to the home.

The factual issues in this proceeding are not difficult to resolve. By the appellant's own admission, he admitted a sixth resident to his adult care home without first obtaining an appropriate waiver or approval of the Multnomah County Adult Care Program and maintained that additional resident in his adult care home for a period of 61 days in violation of MCAR 890-020-1209 (c).

While appellant claims he was somehow pressured or misled by social workers for Multnomah County into accepting this additional resident, it is clear that these County employees were uninformed or misinformed as to the actual number of residents in the home at the time they requested Mr. Durham to accept the new resident. Mr. Durham, conversely, knew exactly how many residents he had. Clearly he had the obligation to either refuse to admit this sixth resident or to seek appropriate waivers or approvals from the Adult Care Program to accept the additional resident. He did neither and, instead, accepted the sixth resident in violation of MCAR 890-020-120(c).

Similarly, the appellant concedes that he had three elderly residents in his home despite the "DD and DSO only" restriction on his adult care license. While there was some dispute at hearing as to the exact meaning of these terms, it appears clear from the evidence that the appellant was well aware that this restriction was intended to preclude elderly residents in the home¹.

While there was much discussion at hearing about whether or not the appellant's co-owner, Ms. Clemence, remains a resident of the home, it is clear that, whatever the intention of the Manager, Ms. Clemence's residency in the home was not made a condition of the license. Accordingly, even if Ms. Clemence is not residing in the home, this would not constitute a violation of any of the conditions of the license nor of the applicable administrative rules. In any case, I note that Ms. Clemence's residency or non-residency in the home was not a basis for the Manager's determination to revoke the license (exhibits 4 and 5).

As the two violations are clearly established, there is adequate factual basis under the Rules to support the Manager's determination to revoke the appellant's license. After review of the evidence, it appears the Manager's determination was appropriate as well. While this review of the Manager's determination is not limited to merely a review for abuse of discretion, the Manager's experience and expertise are entitled to due weight. Moreover, while it does not appear that the appellant's violations directly endangered or harmed any to the residents, it does appear that the violations were serious, substantial, and intentional. Moreover, it does appear that appellant was less than forthright with the Manager and his staff and made a conscious effort to conceal these violations. Taken together, these factors make revocation an appropriate sanction.

The Manager's determination should be modified to change the effective date of the revocation to allow the opportunity for the orderly relocation of the current residents.

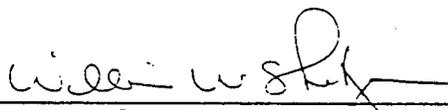
ORDER AND DETERMINATION:

The determination of the Manager of the Multnomah County Adult Care Home Program dated October 1, 1993, revoking the appellant's Adult Care Home license is MODIFIED to change the effective date for removing the residents from the home from November 3, 1993, to February 1, 1994. Except as so modified, the determination is AFFIRMED.

This order and determination has been mailed to the parties on December 28, 1993, and shall become final on January 18, 1994, unless written exceptions are filed with the Board of County Commissioners prior to such date.

Dated: _____

12/28/93


Code Hearings Officer

WWS:db

¹ Apparently either the appellant or his co-owner made at least four requests to County officials for special permission to admit elderly applicants. All of these requests were denied, but the fact they were made demonstrates that the appellant was aware that the "DD and DSO only" restriction precluded elderly residents.

HEALTH

CHAPTER 8.90. ADULT CARE HOMES*

GENERAL PROVISIONS

- 8.90.005. Title; area of application.
- 8.90.010. Policy and purpose.
- 8.90.015. Definitions.
- 8.90.020. Administration and enforcement; powers and duties of director.
- 8.90.030. Institution of legal proceedings.
- 8.90.040. Licensure required; application form.
- 8.90.050. License.
- 8.90.060. Licensure fee.
- 8.90.070. Licenses not transferable.
- 8.90.080. Revocation, suspension, or denial of licenses.
- 8.90.090. Appeals and hearings; review.
- 8.90.100. Inspections.
- 8.90.110. Complaints.
- 8.90.120. Residents' bill of rights.
- 8.90.125. Civil cause of action.
- 8.90.130. Penalty; additional remedies.
- 8.90.140. Savings clause.
- 8.90.150. Intergovernmental agreements.

ADOPTION OF RULES

- 8.90.160. Initiation of rule adoption.
- 8.90.165. Approval of rule form; filing.
- 8.90.170. Contents of notice of intent to adopt.
- 8.90.175. Notice publication.
- 8.90.180. Review and comment period.
- 8.90.185. Rule adoption.
- 8.90.190. Postponement of rule action.
- 8.90.195. Request for public hearing.
- 8.90.200. Public hearing notice contents.
- 8.90.205. Publication of notice of public hearing.
- 8.90.210. Public hearing; action on rule; filing.
- 8.90.215. Appeal to the board of county commissioners.
- 8.90.220. Appeal and review request contents.
- 8.90.225. Commissioner request for review.
- 8.90.230. Date of hearing.
- 8.90.235. Notice of appeal hearing.
- 8.90.240. Conduct of appeal hearing.
- 8.90.245. Temporary rules.
- 8.90.250. Requirements for effective temporary rule.
- 8.90.255. Effective date of temporary rule.
- 8.90.260. Duration of temporary rule.

*Cross reference—Nursing homes, ch. 6.40.

GENERAL PROVISIONS

8.90.005. Title; area of application.

This chapter shall be known as the Multnomah County Adult Care Homes Licensure Ordinance, may be so pleaded and referred to and shall apply to the unincorporated areas of Multnomah County. [Ord. 387 (1983); Ord. 503 (1986)]

8.90.010. Policy and purpose.

(A) The board of county commissioners finds that:

- (1) Approximately 2,000 dependent adults, including the elderly and the mentally and physically disabled, live in unlicensed adult care homes in Multnomah County; and
- (2) The county's program for registration of adult care homes, established in July, 1983, has successfully registered and inspected homes and investigated complaints. However, the effectiveness of this program can be further improved by requiring inspection and approval of all adult care homes prior to operation; and
- (3) State licensure applies to only selected adult care homes.

(B) The board of county commissioners has therefore determined that as a result of the conditions stated above and in the interests of public health, safety, and welfare, there is a need for licensure and inspection of adult care homes and it is desirable to establish chapter 8.90 of title 8 of the Multnomah County Code to address the problem set forth above. It is the intent of this chapter that information gained from licensure and inspection shall be made available to the public to assist in its selection of an adult care home.

[Ord. 387 (1983); Ord. 503 (1986)]

8.90.015. Definitions.

As used in this chapter, unless the context requires otherwise:

(A) *Adult care home* means any home or other facility which provides room and board or room and care for compensation to one or more elderly,

handicapped or dependent person(s) over the age of 18 not related to the owner or operator by blood or marriage. Adult care homes include room and board homes where assistance with major life activities is provided. Adult care homes do not include any facility already licensed by a public agency as a residential care facility or a longterm care facility.

(B) *Board* means the provision of meals on a predictable and/or regular basis.

(C) *Care* means the provision of services that assist the resident in personal care activities, such as assistance with bathing, dressing, grooming, eating and/or services that assist the resident in activities of daily living, such as assistance with ambulation, communication, education, employment, laundry, meal preparation, medication supervision, money management, recreation, socialization, transportation.

(D) *Compensation* means payments in cash, in kind or in labor, by or on behalf of a resident to an operator or common fund.

(E) *Dependent person* means any person who has a physical or mental dependency which for the individual constitutes or results in a functional limitation to one or more major life activities.

(F) *Director* means the director of the department of human services of Multnomah County, Oregon, or his or her designee.

(G) *Elderly person* means any person over the age of 60 who is limited in one or more major life activities.

(H) *Handicapped person* means any person who has a physical or mental impairment which for the individual constitutes or results in a functional limitation to one or more major life activities.

(I) *Licensed adult care home* means a facility which has been investigated and approved by the director. This includes an on-site inspection of the facility and approval of the operator and resident manager, if any, upon application and payment of fees.

(J) *Major life activities* means self-care, ambulation, communication, transportation, education, socialization, employment, and the ability to acquire and maintain adequate, safe, and decent shelter.

(K) *Operator* means the owner, lessor, sublessor, manager, or any other person with the right or power of control over the operations or physical structure of an adult care home.

(L) *Owner* means any person with any legal or equitable interest in, and with the right or power of control over the operations or physical structure of an adult care home.

(M) *Person* includes an individual, partnership, corporation, or organization.

(N) *Resident* means any elderly, handicapped or dependent person not related to the owner or operator by blood or marriage who is or was at any relevant time residing in an adult care home.

(O) *Resident manager* means an employee of the operator who lives in the adult care home and is directly responsible for the facility on a day-to-day basis, and who has been approved by the director.

(P) *Room* means the provision of a place to sleep on a predictable and/or regular basis.
[Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.020. Administration and enforcement; powers and duties of director.

(A) It shall be the responsibility of the director to administer and enforce this chapter and rules adopted under it. The director shall have the authority to initiate enforcement proceedings. Nothing in the provisions of this chapter, however, shall be construed to create a cause or right of action against Multnomah County, its agents or employees for the failure to enforce any provision of this chapter.

(B) The director shall have the authority to promulgate such rules as may be necessary for the administration and enforcement of this chapter, pursuant to the procedures set forth in MCC 8.90.160 through 8.90.260.

(C) The director shall adopt rules and standards governing adult care homes such as are nec-

essary to protect the health, safety, welfare of the residents, but [which] shall not be inconsistent with the residential nature of the living accommodations.

(D) Variances from requirements of this chapter. The specific requirements of this chapter or rules adopted under it may be varied by the director upon good and sufficient cause shown that this action is in keeping with the intent and purpose of this chapter. When a variance is granted, the director shall provide documentation of the reasons for it.

(E) The director shall have the authority to do the following:

- (1) Administer oaths;
- (2) Audit records in order to assure conformance with this chapter;
- (3) Certify official acts;
- (4) Subpoena and require attendance of witnesses at meetings or hearings to determine compliance with this chapter;
- (5) Require the production of relevant documents;
- (6) Swear witnesses;
- (7) Take testimony of witnesses in person or by deposition; and
- (8) Perform all other acts necessary to enforce the provision of this chapter.

[Ord. 387 (1983); Ord. 503 (1986)]

8.90.030. Institution of legal proceedings.

Upon recommendation of the director, the county counsel, acting in the name of the county, may bring an action or proceeding in a court of competent jurisdiction to compel compliance with or restrain by injunction any violations of this chapter or the rules adopted under it. Circumstances in which such an action or proceeding may be brought include but are not limited to the following:

- (A) When an adult care home is operated without valid licensure;

- (B) After notice of denial, suspension, or revocation of a license has been given and a reasonable time for placement of individuals by the operator in other facilities has been allowed, but such placement has not been accomplished.

[Ord. 387 (1983); Ord. 503 (1986)]

8.90.040. Licensure required; application form.

(A) It is unlawful, and it shall constitute an offense in violation of this chapter, for any person to establish, maintain or conduct in Multnomah County any adult care home without first having been licensed by the director of the department of human services. Owners or operators of adult care homes at the time this chapter becomes effective shall apply for a license no later than March 31, 1986.

(B) Every person desiring to establish, maintain, operate or conduct an adult care home in Multnomah County shall make application for a license upon a form supplied by and addressed to the director. The application shall contain a statement giving clear and specific description of the property or place in or upon which the applicant proposes to maintain or conduct an adult care home; the number of residents which can be taken care of; the number of floors to be occupied; the number of beds on each floor; the name, address, telephone numbers, date of birth, and social security number of the applicant; the name, address, telephone numbers, date of birth and social security number of the resident manager, if other than the applicant, who will be living in the adult care home; the names, addresses and telephone numbers of all owners of the adult care home; and any other information requested by the director.

(C) An owner or operator must live in an adult care home where assistance with major life activities is provided on a 24-hour basis or hire a resident manager in order for the adult care home to be licensed pursuant to this section. If during the period covered by the license a resident manager changes, within 15 days the operator must submit an application for a new resident manager and request a new license.

[Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.050. License.

(A) After receipt of the application, and upon payment of the prescribed fee, the director shall cause an investigation to be made and subject to the provisions of MCC 8.90.080, the director shall issue a license to the owner or operator if the adult care home is in compliance with the provisions of this chapter and the rules and standards established by the director. Licenses are effective for one year from the date of issue unless sooner revoked and shall be renewed annually on a date established by the director. The director shall maintain a registry of adult care homes licensed under this chapter.

(B) The owner or operator of the adult care home to whom a license is issued shall post the license in a conspicuous place on the premises.

(C) The license shall state the name of the operator, the name of the resident manager, if any, the address of the licensed adult care home, and the maximum number of residents permitted, and shall state in bold type the telephone number and procedure for making complaints.

[Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.060. Licensure fee.

There shall be a licensure fee of \$20.00 per bed per annum up to a maximum of \$100.00 per annum, payable to the department of human services. There shall be a fee of \$10.00 for each change of resident manager.

[Ord. 387 (1983); Ord. 503 (1986)]

8.90.070. Licenses not transferable.

No license which has been issued for the operation of an adult care home to any person for a given location shall be valid for use by any other person or at any location other than that for which it is issued.

[Ord. 387 (1983); Ord. 503 (1986)]

8.90.080. Revocation, suspension, or denial of licenses.

(A) The director shall have the authority to revoke, suspend, or deny or attach conditions to any license for an adult care home under the following circumstances and such other circumstances as

may be established by rules adopted under this chapter:

- (1) When the certificate was issued upon fraudulent or untrue representation.
- (2) Where there exists a threat to the life, health, safety, or welfare of any resident.
- (3) When there is reliable evidence of abuse, neglect or exploitation of any resident.
- (4) When the owner or operator has failed to comply with the provisions of this chapter; with city and county codes and ordinances; with the rules and standards duly promulgated by the director for an adult care home; or any other state or federal law or rule applicable or relevant to the health or safety of a resident.

(B) Denial, suspension or revocation of a license by the director shall be preceded by a hearing under MCC 8.90.090 if requested by the owner or operator, unless the license is denied, suspended or revoked for the reason of an imminent threat to the life, health, safety, or welfare of a resident, or the reason of abuse, neglect or exploitation of a resident in which case the denial, suspension or revocation shall be effective upon order of the director. Conditions attached to a license shall be effective upon order of the director.

(C) An owner or operator of an adult care home whose license has been revoked, suspended or denied, or who has operated without a license in violation of this chapter, has a duty, when so ordered by the director, to effect orderly and appropriate placement of all residents, and to refund any monies due, within a reasonable period of time from the effective date of the order. The owner or operator shall cooperate with the department of human services, which shall assist the residents and operator in effecting such placement.

(D) Any owner or operator of an adult care home whose license has been revoked, suspended or denied two times within one year, or who has had a total of four denials or revocations in any three-year period, shall be disqualified from applying for a license for a period of two years from the date of the last suspension, denial or revocation. [Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.090. Appeals and hearings; review.

(A) Any owner or operator aggrieved by any decision of the director with regard to its application for licensure, or a violation of this chapter, may request a hearing by filing a written request with the director. The request for a hearing shall be filed within ten days of receipt of written notice of the director's action and shall set forth reasons for the hearing and issues to be heard. The director may prescribe forms for the filing of an appeal.

(B) Upon receipt of a timely request for a hearing, the director shall designate and promptly notify the hearings officer, who shall set a time and place for a hearing. The hearing shall not be scheduled more than 30 days from the date of the receipt of request for hearing. The hearings officer shall give the aggrieved owner or operator who has requested a hearing pursuant to subsection (A) of this section not less than ten days' written notice of the time and place of hearing and shall cause such notice to be posted in a conspicuous place at the adult care home.

(C) Any resident who is to be provided care and who is not covered by the Residential Landlord and Tenant Act, or any person acting in such a resident's behalf, may request a hearing by filing a request with the director following receipt of a notice of involuntary eviction, transfer, or discharge from an owner, operator or payor for the resident. An adult care home owner, operator or employee who receives a request for such a hearing shall immediately notify the director.

(D) Upon receipt of a request for a hearing on an involuntary eviction, transfer or discharge pursuant to subsection (C) of this section, the director shall promptly cause an investigation to be made to determine if a resolution can be achieved without a hearing. If a resolution cannot be achieved, the director shall designate and promptly notify the hearings officer, who shall set a time and place for a hearing. The hearing shall not be scheduled more than 30 days from the date the director receives the request for a hearing. The hearings officer shall give the parties written notice of the time and place of hearing. If the director has determined that immediate transfer is justified by an emergency as specified in rules

adopted under this chapter, then this hearing may occur after such transfer has taken place.

(E) Hearings shall be conducted, by the hearings officer in accordance with the attorney general's Model Rules of Procedure, rule 137.03.005 and 137.03.030 through 137.03.050 (November 17, 1981) unless superseded by rules adopted by the director. The director shall adopt rules and standards concerning involuntary evictions, transfers or discharges involving residents receiving care, including information to be considered, such as the effect of the move on the resident, and standards for decisions in hearings.

(F) "Party" means a person who is a party to the proceeding or hearing and, unless such rights are waived, is entitled to participate in the manner or area(s) specified by the hearings officer according to rule duly promulgated pursuant to MCC 8.90.160 through 8.90.260. Parties include:

- (1) Multnomah County, through the initiating bureau or department;
- (2) The person(s) requesting the hearing and named respondents;
- (3) Residents of the involved adult care home where vacation, closure, demolition, or relocation of residents is a reasonable possible outcome of the proceeding or hearing.

(G) Disclosure of ex parte communications shall be made by the hearings officer, director, or the board of county commissioners in accordance with the attorney general's Model Rules of Procedure, rules 137.03.062 through 137.03.064 (November 17, 1981).

(H) The hearings officer shall issue an order as soon as is practicable but in no event later than 45 days after the termination of the hearing and shall mail a copy of the order to the parties. The order shall include an opinion containing findings of fact and conclusions of law explaining the reason and rationale adopted by the hearing officer in arriving at his or her conclusions.

(I) The hearings officer's order shall become a final order if no written exceptions are filed. The hearings officer shall notify the parties of the date when written exceptions to the order must be filed

to be considered by the board of county commissioners.

(J) Upon receipt of the hearings officer's order and after reviewing the record of the proceedings and written exceptions filed by the parties, the board of county commissioners may accept, modify or reject the order or may remand the matter to the hearings officer. If the hearings officer's order is reviewed by the board, the board shall then issue a final order. Nothing in this section shall prevent the board of county commissioners from conducting a hearing or scheduling oral arguments, if written exceptions are filed pursuant to subsection (I) of this section, before issuing a final order. The board's action shall be taken at a regular meeting of the board and shall be taken in the form of a board order. The final order shall be filed with the clerk of the board and the director and mailed to the parties.

(K) Review of the final order of the board of county commissioners shall be taken solely and exclusively by writ of review in the manner set forth in ORS 34.010 to ORS 34.100. [Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.100. Inspections.

(A) The director or authorized representative of the director, including but not limited to county, city, and state officials, shall have full authority to and may enter, at any reasonable time, any adult care home licensed pursuant to this chapter or any unlicensed adult care home which the director has cause to believe is operating without a license and inspect the entire premises for the purposes of ascertaining the safe, sanitary and habitable condition thereof and the physical and mental condition of the residents. The director or the director's authorized representative shall have full authority to and may privately interview any resident and inspect any records concerning residents maintained by the adult care home.

(B) In the event that the director or his or her authorized representative is denied access to any adult care home for the purpose of making an inspection in the administration of this chapter, the director or his or her authorized representative shall not inspect without a search warrant or its equivalent.

(C) The director may proceed ex parte to seek a warrant or its equivalent. Application for a search warrant to inspect the premises shall be made to any magistrate authorized to issue a warrant of arrest. The application must be supported by an affidavit filed with the magistrate stating the purpose and extent of the proposed inspection, whether it is a routine or periodic inspection or an inspection instituted by complaint and other specific or general information concerning the premises.

(D) The director or the director's authorized representative shall report observations of or evidence of substandard conditions or poor care to the director and shall report observations or evidence indicating a potential need for protective services including abuse, neglect, or exploitation of a resident to the appropriate agency. The director may make recommendations for corrective action.

[Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.110. Complaints.

(A) Complaints against licensed or unlicensed adult care homes may be filed with the director by any person, whether or not a resident of the home. The director shall investigate and respond promptly to each complaint subject to the resources of the department of human services.

(B) The director shall maintain a file of all complaints and the action taken on the complaint, if any, indexed by the name of the owner or operator and the address of the adult care home. The filed complaint forms shall protect the privacy of both the complainant and the resident.

(C) It is the intent of this chapter that information shall be made available to the public which would assist the public in its selection of an adult care home. To this end, the director may make available the relevant information in the complaint files for inspection and copying by the public. The director may, however, in accordance with the provisions of ORS 410.610 through 410.690 (1981 Replacement Part) or according to rule duly promulgated pursuant to MCC 8.90.160 through 8.90.260, classify certain files as confidential.

(D) No owner or operator of an adult care home shall retaliate against a resident by increasing charges; decreasing services, rights or privileges; or threatening to increase charges or decrease services, rights or privileges; by taking or threatening to take any action to coerce or compel the resident to leave the facility, including bringing or threatening to bring an action for possession; or by abusing or threatening to harass or to abuse a resident in any manner after the resident or any person acting on behalf of the resident has filed a complaint with the director.

(E) No owner or operator of an adult care home shall retaliate against an employee who has filed a complaint with the director.

[Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.120. Residents' bill of rights.

(A) Each owner and operator of an adult care home shall comply with the residents' bill of rights. Each owner and operator shall post in a conspicuous place on the premises the residents' bill of rights, monthly rates and house rules. The director shall provide owners and operators with copies of the residents' bill of rights.

(B) The residents' bill of rights shall read as follows:

The Residents' Bill of Rights

To guarantee that each resident is treated with respect and dignity, each resident has the right:

- (1) Not to be denied his or her constitutional and legal rights, including but not limited to the right:
 - (a) To vote;
 - (b) To practice the religion of his or her choice;
 - (c) To freedom of movement;
 - (d) To privacy.
- (2) To a safe and sanitary environment.
- (3) To be free from chemical or physical restraints except as ordered by a physician.
- (4) To talk privately with any doctor, nurse, attorney, family member, caseworker, and/or other person of choice.

- (5) To receive visitors free from arbitrary and unreasonable restrictions, including representatives of community and advocacy organizations.
 - (6) To send and receive mail unopened, unless medically contra-indicated and documented by a physician.
 - (7) To manage his or her own financial affairs unless a guardian or authorized representative requires in writing that the provider assume this responsibility.
 - (8) To keep and use reasonable personal belongings and to have private, secure storage space.
 - (9) Not be forced to work against his or her will.
 - (10) To be paid for agreed-upon work done.
 - (11) If meals are to be provided, to daily adequate and nutritious meals.
 - (12) To clean bedding.
 - (13) To receive written notice 30 days prior to a rate increase and 30 days prior to eviction.
 - (14) To prompt return of security deposits and advance payments of rent.
 - (15) To a written statement signed by the owner/operator regarding the services to be provided and the rates, and if requested, countersigned by the resident.
 - (16) If care is to be provided, not to be involuntarily evicted, transferred or discharged without opportunity for a hearing, by filing a request with the department of human services as provided for in the adult care home licensure ordinance MCC 8.90.090, to determine if medical reasons, if the welfare of the resident, other residents or the operator, or if nonpayment justifies such action.
- [Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.125. Civil cause of action.

A violation of any of the rights set forth in MCC 8.90.120 or the rules adopted in connection with MCC 8.90.120 creates a civil claim by the resi-

dent against the owner or operator of the adult care home. The resident may bring an individual action in an appropriate court for injunctive relief and/or recover actual damages or \$1,000.00 whichever is greater. The court may provide such equitable relief as it deems proper, and may award, in addition to relief provided in this section, reasonable attorney fees, at trial and on appeal, and costs. If the defendant prevails, the court may award reasonable attorney fees at trial and on appeal, and costs if it finds the action to be frivolous.

[Ord. 387 (1983)]

8.90.130. Penalty; additional remedies.

(A) Any person who violates a provision of this chapter or the rules promulgated thereunder may be punished by a fine in an amount to be fixed by the director, not to exceed \$1,000.00 for each violation. In addition, a continuing violation will subject the owner or operator to an action for injunctive relief.

(B) The provisions of this chapter are in addition to and not in lieu of other procedures and remedies provided by law.

[Ord. 387 (1983); Ord. 392 (1983); Ord. 503 (1986)]

8.90.140. Savings clause.

In the event any subsection, subdivision, phrase, clause, sentence or word in this chapter is for any reason held invalid or unconstitutional by a court of competent jurisdiction, such holding shall not invalidate the remainder of this chapter, but shall be confined to such subsection, subdivision, phrase, clause, sentence or word.

[Ord. 387 (1983)]

8.90.150. Intergovernmental agreements.

The county may enter into agreements with municipal corporations in the county permitting enforcement of this chapter within those municipal corporations. In addition, the county may enter into such agreements with the state as are necessary to permit administration and enforcement of this chapter within Multnomah County.

[Ord. 387 (1983); Ord. 392 (1983)]

ADOPTION OF RULES

8.90.160. Initiation of rule adoption.

The director or any member of the board of county commissioners may propose adoption, amendment or repeal of a rule under this chapter.
[Ord. 387 (1983)]

8.90.165. Approval of rule form; filing.

The proposed rule shall be approved as to form by the county counsel and filed with the director and the clerk of the board of county commissioners.
[Ord. 387 (1983)]

8.90.170. Contents of notice of intent to adopt.

Notice of intent to adopt a proposed rule shall contain the following information:

- (A) Description of the proposed action, i.e., adoption, repeal, or amendment.
- (B) A summary of the intent, subject and content of the proposed rule.
- (C) Complete text of the proposed rule where practicable, or the location, time and contact person for obtaining a copy of the complete text of the proposed rule.
- (D) The time limit, location, contact person and format for submitting views and comments on the proposed rule.
- (E) The time limit, location, format and contact person for requesting postponement of the action on the proposed rule.

[Ord. 387 (1983)]

8.90.175. Notice publication.

In addition to such notice as may be required by law, notice of intent to adopt a rule shall be made in the following manner:

- (A) Publication in a newspaper of general circulation at least 15 days before the close of the review period.
- (B) Posting in a prominent location in the county courthouse at least 15 days before the close of the review period.

[Ord. 387 (1983)]

8.90.180. Review and comment period.

Notice of intent to adopt a proposed rule shall be made after the notice is filed with the clerk of the board of county commissioners. The review period for submitting comments shall be 15 days and shall commence with publication of notice of intent to adopt a proposed rule.
[Ord. 387 (1983)]

8.90.185. Rule adoption.

If at the close of the review period there have been no requests for a postponement or a public hearing, the director shall, within ten days from the close of the review period, consider the review comments and either adopt or reject the proposed rule or adopt the rule with modifications. If a proposed rule is to be substantially amended as a result of review comments, it must be considered as a newly proposed rule. The adopted rule shall be filed with the director and the clerk of the board of county commissioners within ten days from the close of the review period.
[Ord. 387 (1983)]

8.90.190. Postponement of rule action.

If within the review period an interested person requests postponement of the intended action, the director, if the grounds are judged to be sufficient, shall postpone the intended action no less than ten days nor more than 60 days to allow the requesting person an opportunity to submit data, views or arguments. A request for postponement must be made in writing to the director and must include a statement of the identity and interest of the requesting person and of the grounds for requesting postponement.
[Ord. 387 (1983)]

8.90.195. Request for public hearing.

If within the review period ten or more persons, or an association with ten or more members or a corporation requests, in writing, a public hearing on the proposed rule, the director shall announce and conduct a public hearing.
[Ord. 387 (1983)]

8.90.200. Public hearing notice contents.

Notice for a public hearing on a proposed rule shall contain the following information:

- (A) Description of the proposed action, i. e., adoption, repeal or amendment.
- (B) A summary of the intent, subject and content of the proposed rule.
- (C) The date, time, place and presiding officer of the public hearing and the manner in which interested persons may present their views.
- (D) Complete text of the proposed rule if practicable or the location, time and contact person for obtaining a copy of the complete text of the proposed rule.
- (E) The time limit, location, format and contact person for appealing the decision of the director to the board of county commissioners.

[Ord. 387 (1983)]

8.90.205. Publication of notice of public hearing.

The notice of a public hearing shall be published in a newspaper of general circulation within Multnomah County and posted prominently in the county courthouse at least ten days before the hearing. Notice of the public hearing shall also be given by mail to all parties who have submitted comments and to the mailing list of the interested parties.

[Ord. 387 (1983)]

8.90.210. Public hearing; action on rule; filing.

The director shall conduct the public hearing. At the close of the hearing the director shall adopt, reject or amend the proposed rule. No further notice is required for continuation of a hearing to a certain date. The director shall file notice of the action taken with regard to the proposed adoption, amendment or repeal of a rule with the clerk of the board of county commissioners within five days of the public hearing. Filing of the notice of action with the clerk of the board of county commissioners initiates a ten-day appeal period. If no appeal is made, the action by the director in re-

gard to the rule shall take effect at the end of the appeal period, unless a later effective date is specified.

[Ord. 387 (1983)]

8.90.215. Appeal to the board of county commissioners.

Any interested person may appeal the action of the director on a rule after a public hearing on the matter. Any member of the board of county commissioners may also request review of the action. Appeal must be made in writing and filed with the director within ten days of filing of the notice of action with the clerk of the board of county commissioners. Members of the board of county commissioners must request review within the same time.

[Ord. 387 (1983)]

8.90.220. Appeal and review request contents.

The appeal request shall contain the following:

- (A) An identification of the decision or action being appealed, including its date.
- (B) A statement of the identity interest of the person making the appeal.
- (C) The specific grounds for the appeal.

[Ord. 387 (1983)]

8.90.225. Commissioner request for review.

A member of the board of county commissioners may initiate review by requesting that the matter be placed on the agenda for the board's next regular meeting.

[Ord. 387 (1983)]

8.90.230. Date of hearing.

Upon receipt of an appeal request in conformance with the requirement of MCC 8.90.220, the director shall schedule a hearing by the board of county commissioners at the board's next regular meeting for which the agenda has not closed and the date of which permits ten days to publish notice in a newspaper of general circulation.

[Ord. 387 (1983); Ord. 392 (1983)]

8.90.235. Notice of appeal hearing.

The county shall prepare notice for appeal of hearings. The notice shall contain the information described in MCC 8.90.200(D) and (E). Notice shall be published in a newspaper of general circulation in the county and posted prominently in the county courthouse at least ten days prior to the hearing. The county and shall also notify by mail persons who have submitted comments on the proposed rule and to the mailing list of interested parties.

[Ord. 387 (1983)]

8.90.240. Conduct of appeal hearing.

The appeal hearing shall be conducted as a regular meeting of the board of county commissioners. The board's action shall take the form of a board order.

[Ord. 387 (1983)]

8.90.245. Temporary rules.

The director may be confronted with a situation where it is necessary to put a rule into immediate effect in order to protect the public or the interests of particular parties. In that case, and where there is not sufficient time to follow the procedure requirements set forth in MCC 8.90.160 to 8.90.240, the director is authorized to use temporary rules.

[Ord. 387 (1983)]

8.90.250. Requirements for effective temporary rule.

The director may proceed without prior notice or hearing that he or she finds practicable, to adopt a rule without the notice otherwise required by this chapter. In that case, the director shall:

- (A) File a certified copy of the rule with the clerk of the board of county commissioners.
- (B) File with the rule the director's finding that failure of the director to act promptly will result in serious prejudice to the public interest or to the interest of the parties concerned. Findings shall be supported by a statement of specific facts and reasons.

- (C) Take appropriate measures to make the temporary rule known to the persons who may be affected by the temporary rule, including publication in a newspaper of general circulation in the county, as promptly after filing the rule as practicable and giving notice of the rule by mail to persons who may be affected by it.

[Ord. 387 (1983)]

8.90.255. Effective date of temporary rule.

A temporary rule adopted in compliance with MCC 8.90.250 and this section becomes effective immediately upon filing with the clerk of the board of county commissioners or at a later time which may be designated by the rule itself.

[Ord. 387 (1983)]

8.90.260. Duration of temporary rule.

A temporary rule may be effective for a period of not longer than 120 days. No temporary rule may be renewed after it has been in effect 120 days. The director may, however, adopt an identical rule on notice in accordance with the procedures set forth in this chapter.

[Ord. 387 (1983)]



CITY OF
PORTLAND, OREGON
OFFICE OF CITY ATTORNEY

Jeffrey L. Rogers, City Attorney
1220 S.W. 5th Avenue
Portland, Oregon 97204
(503) 823-4047

February 9, 1994

INTEROFFICE MEMORANDUM

TO: Board of County Commissioners

FROM: Peter Kasting^{PK}
Senior Deputy City Attorney

SUBJ: Appeal of Greg Durham from Hearings Officer Decision
Revoking Appellant's Adult Care Home License

BOARD OF
COUNTY COMMISSIONERS
1994 FEB -9 PM 2 10
MULTNOMAH COUNTY
OREGON

At its meeting on February 17, 1994, the Board needs to decide whether it wants to (1) hold a hearing to accept evidence and argument on the appeal or (2) decide this appeal on the record. MCC section 8.90.090 (J) and section 890-90-450 of the Administrative Rules for Licensure of Adult Care Homes give the Board discretion to follow either course.

The meeting on the 17th is not intended to address the merits of the appeal. It is only to decide whether the Board wants to receive additional evidence and argument in this matter.

A copy of the hearings officer's decision is attached for your reference. I have also attached the appellant's exceptions to the hearing's officer's decision and the Department of Social Service's response to the exceptions.

I will be attending the meeting on the 17th. Mr. Durham and Mr. Lazenby are likely to attend also. If the Board wants to hear from them on why a hearing should or should not be scheduled (and on that question only), I would suggest giving each side two minutes to make a statement.

c: Greg Durham
Chip Lazenby
Stephen Balog

¹The appellant's exceptions do not clearly identify how the appellant believes the hearings officer erred. Section 890-090-420 of the administrative rules provides that "A written exception shall set forth reasons for the exception and specific objections to the findings, conclusions, corrective actions, and/or sanctions contained in the order." The appellant in this case does not appear to have complied with this rule.



CITY OF
PORTLAND, OREGON

HEARINGS OFFICE

1120 S.W. 5th Avenue, Room 1017
Portland, Oregon 97204-1960
Elizabeth A. Normand, Land Use Hearings Officer
(503) 823-7719
William W. Shatzer, Code Hearings Officer
(503) 823-7307
FAX (503) 823-5370

HEARINGS OFFICER'S ORDER

APPEAL OF GREG DURHAM

HEARING NO. 134022

DATE OF HEARING: December 16 and 17, 1993

APPEARANCES:

Mr. Greg Durham, appellant, personally and by his attorney, Mr. Jeffrey S. Bennett

Mr. H. H. Lazenby, Jr., Deputy County Counsel

HEARINGS OFFICER: Mr. William W. Shatzer

FINDINGS OF FACT AND CONCLUSIONS OF LAW:

This is an appeal from a determination by the Director of the Multnomah County Adult Care Program revoking the Adult Care Home License of the appellant, Mr. Durham. The Director determined that the license holders had violated the provisions of MCAR 890-020-120 (c) by having more than five residents in the home and had violated a condition of the license by admitting non-DD and non-DSO residents to the home.

The factual issues in this proceeding are not difficult to resolve. By the appellant's own admission, he admitted a sixth resident to his adult care home without first obtaining an appropriate waiver or approval of the Multnomah County Adult Care Program and maintained that additional resident in his adult care home for a period of 61 days in violation of MCAR 890-020-1209 (c).

While appellant claims he was somehow pressured or misled by social workers for Multnomah County into accepting this additional resident, it is clear that these County employees were uninformed or misinformed as to the actual number of residents in the home at the time they requested Mr. Durham to accept the new resident. Mr. Durham, conversely, knew exactly how many residents he had. Clearly he had the obligation to either refuse to admit this sixth resident or to seek appropriate waivers or approvals from the Adult Care Program to accept the additional resident. He did neither and, instead, accepted the sixth resident in violation of MCAR 890-020-120(c).

Similarly, the appellant concedes that he had three elderly residents in his home despite the "DD and DSO only" restriction on his adult care license. While there was some dispute at hearing as to the exact meaning of these terms, it appears clear from the evidence that the appellant was well aware that this restriction was intended to preclude elderly residents in the home¹.

While there was much discussion at hearing about whether or not the appellant's co-owner, Ms. Clemence, remains a resident of the home, it is clear that, whatever the intention of the Manager, Ms. Clemence's residency in the home was not made a condition of the license. Accordingly, even if Ms. Clemence is not residing in the home, this would not constitute a violation of any of the conditions of the license nor of the applicable administrative rules. In any case, I note that Ms. Clemence's residency or non-residency in the home was not a basis for the Manager's determination to revoke the license (exhibits 4 and 5).

As the two violations are clearly established, there is adequate factual basis under the Rules to support the Manager's determination to revoke the appellant's license. After review of the evidence, it appears the Manager's determination was appropriate as well. While this review of the Manager's determination is not limited to merely a review for abuse of discretion, the Manager's experience and expertise are entitled to due weight. Moreover, while it does not appear that the appellant's violations directly endangered or harmed any to the residents, it does appear that the violations were serious, substantial, and intentional. Moreover, it does appear that appellant was less than forthright with the Manager and his staff and made a conscious effort to conceal these violations. Taken together, these factors make revocation an appropriate sanction.

The Manager's determination should be modified to change the effective date of the revocation to allow the opportunity for the orderly relocation of the current residents.

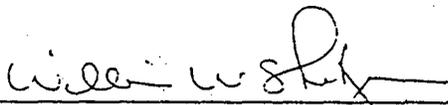
ORDER AND DETERMINATION:

The determination of the Manager of the Multnomah County Adult Care Home Program dated October 1, 1993, revoking the appellant's Adult Care Home license is MODIFIED to change the effective date for removing the residents from the home from November 3, 1993, to February 1, 1994. Except as so modified, the determination is AFFIRMED.

This order and determination has been mailed to the parties on December 28, 1993, and shall become final on January 18, 1994, unless written exceptions are filed with the Board of County Commissioners prior to such date.

Dated: _____

12/28/93



Code Hearings Officer

WWS:db

¹ Apparently either the appellant or his co-owner made at least four requests to County officials for special permission to admit elderly applicants. All of these requests were denied, but the fact they were made demonstrates that the appellant was aware that the "DD and DSO only" restriction precluded elderly residents.

1-13-94

To The Clerk of The Multnomah County
Board of County Commissioners;

We, Greg Durlson & Bethy Clemence,
DBA Caring Hearts Adult Foster Care,
would like this letter to be our notice
that we would like to appeal Hearings
Officer Spitzer's decision to revoke our
license to provide foster care, hearing
no: 134022. Thankyou.

BOARD OF
COUNTY COMMISSIONERS
1994 JAN 14 AM 9:58
MULTNOMAH COUNTY
OREGON

Sincerely,
Greg Durlson

5027 NE 19th Ave.
Portland, Or 97211
503-284-7694

cc: Steve Batoca
CHIP LAZENBY



MULTNOMAH COUNTY OREGON

DEPARTMENT OF SOCIAL SERVICES
AGING SERVICES DIVISION (503) 248-3646
ADULT CARE HOME PROGRAM (503) 248-3000
421 S.W. 5TH, ROOM 405
PORTLAND, OREGON 97204-2221

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Clerk of the Board of County Commissioners
FROM: Stephen P. Balog, Manager *SB*
Adult Care Home Program
DATE: February 1, 1994
SUBJECT: Appeal of Mr. Greg Durham

1994 FEB -2 AM 10:05
MULTNOMAH COUNTY
OREGON
BOARD OF
COUNTY COMMISSIONERS

This written rebuttal to the appeal of Greg Durham is filed pursuant to MCAR 890-090-430.

The agency has reviewed the appeal and determined that the appeal seeks review of the entire ruling of the Hearings Officer. (Copy attached).

After two days of testimony, the Hearings Officer determined that there were violations of the Adult Care Home Rules which were "serious, substantial and intentional". Mr. Durham clearly violated the Rules by taking more than 5 residents into his home. During the hearing he admitted doing so. This is a clear and significant violation of Care Home Rules. The Hearings Officer specifically found that Durham intentionally violated this rule by ignoring his "obligation to either refuse to admit this sixth resident or to seek appropriate waivers or approvals from the Adult Care Home Program...He did neither and, instead, accepted the sixth resident in violation of the rules".

Durham also violated the rules by taking residents outside the restrictions placed on types of residents that he was authorized to care for as a condition of being licensed. In this violation he accepted elderly residents knowing that his license specifically barred him from serving such clients. In fact, Durham had requested exception that would allow him to serve elderly and those requests were denied. He proceeded to accept the residents anyway.

In addition to these violations of the rules, it was clear from the evidence introduced at the hearing that Durham took steps to conceal these violations from the Adult Care Home Program. The Hearings Officer's conclusion that Durham was "less than

forthright with the Manager and his staff" is charitably understated.

The agency believes that revocation of this license was an appropriate sanction and concurs with the reasoning of the Hearings Officer. There is little factual dispute in the record concerning the violations or Mr. Durham's duplicitous behavior. The decision of this office, which was sustained by the Hearings Officer, should be upheld.

c. H.H. Lazenby, County Counsel
Jeff Bennett, Attorney at Law
William Shatzer, Hearings Officer
Greg Durham



CITY OF

PORTLAND, OREGON

OFFICE OF CITY ATTORNEY

Jeffrey L. Rogers, City Attorney
1220 S.W. 5th Avenue
Portland, Oregon 97204
(503) 823-4047

February 9, 1994

INTEROFFICE MEMORANDUM

TO: Board of County Commissioners

FROM: Peter Kasting
Senior Deputy City Attorney

SUBJ: Appeal of Greg Durham from Hearings Officer Decision
Revoking Appellant's Adult Care Home License

1994 FEB -9 PM 2 10
MULTNOMAH COUNTY
OREGON
BOARD OF
COUNTY COMMISSIONERS

At its meeting on February 17, 1994, the Board needs to decide whether it wants to (1) hold a hearing to accept evidence and argument on the appeal or (2) decide this appeal on the record. MCC section 8.90.090 (J) and section 890-90-450 of the Administrative Rules for Licensure of Adult Care Homes give the Board discretion to follow either course.

The meeting on the 17th is not intended to address the merits of the appeal. It is only to decide whether the Board wants to receive additional evidence and argument in this matter.

A copy of the hearings officer's decision is attached for your reference. I have also attached the appellant's exceptions to the hearing's officer's decision and the Department of Social Service's response to the exceptions.

I will be attending the meeting on the 17th. Mr. Durham and Mr. Lazenby are likely to attend also. If the Board wants to hear from them on why a hearing should or should not be scheduled (and on that question only), I would suggest giving each side two minutes to make a statement.

c: Greg Durham
Chip Lazenby
Stephen Balog

¹The appellant's exceptions do not clearly identify how the appellant believes the hearings officer erred. Section 890-090-420 of the administrative rules provides that "A written exception shall set forth reasons for the exception and specific objections to the findings, conclusions, corrective actions, and/or sanctions contained in the order." The appellant in this case does not appear to have complied with this rule.

CAREY & MARKS
ATTORNEYS AT LAW

GORDON T. CAREY JR., P.C.
STEVEN G. MARKS, P.C.*

TELEPHONE: 503-222-1415
FACSIMILE: 503-222-1923

*ALSO LICENSED IN ALASKA

520 S.W. YAMHILL
414 PACIFIC BUILDING
PORTLAND, OR 97204-1383

February 16, 1994

Multnomah County Board of
County Commissioners
Office of the Board Clerk
Suite 1510 Portland Building
1120 S.W. Fifth Avenue
Portland, Oregon 97204

BOARD OF
COUNTY COMMISSIONERS
1994 FEB 16 PM 4:14
MULTNOMAH COUNTY
OREGON

Re: Appeal of Gregory Durham Regarding Revocation of Adult
Care Home License (Agenda Item R-2 for February 17, 1994)

To the Board of County Commissioners:

Gregory Durham respectfully requests the Board of County Commissioners hold a hearing to accept evidence and argument on his appeal regarding revocation of his Adult Care Home License. Mr. Durham believes that a hearing is necessary to establish the following points:

1. There is a dire need for adult care home facilities in Northeast Portland, and that need is currently not being fulfilled;
2. This revocation proceeding has never alleged harm, or inadequate care, to residents of Mr. Durham's adult care home facility. Quite the contrary is true. Attachment 1 to this letter contains letters written from county case workers (2) attesting to the excellent level of care provided at the facility. The other letters in attachment 1 are from former residents and relatives of residents of the facility, all attesting to the excellent care received at the facility;
3. The county alleges two violations as the basis for revocation:
 - A. The first violation is that six residents were in the home at one time, rather than the maximum of five. However, attachment 2 to this letter is an entry prepared by Multnomah County staff which proves that Mr. Durham told county case workers the facility was full, and they insisted that Mr. Durham accept a sixth resident. He did so as an accommodation and to fill an urgent need;

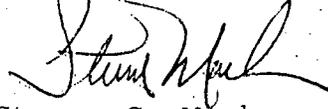
Multnomah County Board
of County Commissioners
February 16, 1994
Page 2

- B. The county seeks revocation because Mr. Durham accepted three elderly residents. Attachment 3 is another entry prepared by Multnomah County staff where the county admits that it listed Mr. Durham's facility as an elderly facility (see 9/7/93 entry) and county workers continued to refer elderly residents to Mr. Durham, who accepted them.

Given these circumstances, we suggest that a full hearing be held to determine if revocation of Mr. Durham's license is in the public interest.

Respectfully Submitted,

CAREY & MARKS



Steven G. Marks
Of Counsel to Gregory Durham

cc: Peter A. Kasting
Portland City Attorneys' Office



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN RESOURCES
AGING SERVICES DIVISION
NORTHEAST BRANCH
5325 N.E. M.L. KING BLVD.
P.O. BOX 11366
PORTLAND, OREGON 97211-0366
(503) 248-5470

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY • CHAIR OF THE BOARD
PAULINE ANDERSON • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
RICK BAUMAN • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

Greg Durham
5027 NE 19th ave
Portland, OR 97211

October 8, 1993

Dear Greg:

I want to thank you on behalf of the agency, for the time and effort you have extended to ward our residents. I especially appreciate your following through with Alvin Olshick's medical appointments to find out if he can have hip replacement surgery. This issue has been unresolved since January of this year. Hopefully we should have an answer one way or another in the next few days.

Thanks again,

Jim Sweeney



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN RESOURCES
AGING SERVICES DIVISION
NORTHEAST BRANCH
5325 N.E. M.L. KING BLVD.
P.O. BOX 11366
PORTLAND, OREGON 97211-0366
(503) 248-5470

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

December 12, 1993

Greg Durham
5027 NE 19th Avenue
Portland, OR 97211

Dear Greg:

Since July 14, 1993 I have placed three elderly men in your adult foster care home. I believe that your home provided excellent hands on care for each of these clients, and would have no reason not to place anyone in your facility in the future if adult housing approves.

Yours truly,

Jim Surrency, Case Manager II
NE Aging Services

To Whom It May Concern:

RE: GREG DURHAM CARE PROVIDER

I have had occasion to visit the Caring Heart's AFH owned and operated by Mr. Greg Durham. My observation on those visits was that the care provider keeps a pleasant, clean, and caring environment for the residence in his home. He is very attentive to their needs and not only provides the daily routine needs of each individual but provides psychosocial needs as well.

The provider keeps extensive records and goes the extra mile in improving each persons standard of living in a way that is not offensive to the individual.

Due to the limited amount and quality of Adult Foster Homes in the North/Northeast area, this home is an invaluable resource.

To Whom It May Concern;

I am very concerned about the possibility of "Caring Hearts" losing their license.

I am quite knowledgeable about Foster Care Homes because my sister-in-law and friends of mine were in homes in Eugene and I have visited friends here in Astoria who are foster care homes.

I was very impressed with the home-like atmosphere of Caring Hearts. We visited 4 or 5 times while our Cousin was at "Caring Hearts". The patients enjoyed the use of the home other than their own rooms. They could watch T.V., converse with the care-givers or other patients, enjoy coffee at the dining room table etc. It has a real home like feeling.

Medications were administered according to doctor's orders and the food was prepared and served according to a preplanned menu.

I would suggest that you look closely at all aspects of "Caring Hearts" Foster Home before you make a final decision. We need more foster homes managed by caring people like the Care-Givers of "Caring Hearts".

Sincerely,
Jurne E. Brockhoff

October 13, 1993

Greg Durham
Caring Hearts Adult Foster Care
5027 N.E. 19th Avenue
Portland, Oregon 97211

Dear Greg:

As the parents and family of William Bonds, one of your residents, we wish to commend your facility for the care given William (Bill).

Bill is very happy in your home and in our frequent visits to him, we have found you to be taking very good care of him mentally and physically. We sincerely appreciate what you do for Bill.

Very truly yours,

Ainslie Bonds
Verna Bonds

Ainslie & Verna Bonds
and Family

William R. Bonds
5027 NE 19th Ave.
Portland, OR 97211-5605

October 13, 1993

Department of Social Services
Adult Care Home Program
421 SW Fifth Ave, Room 405
Portland, OR 97204-2221

Attention : Mr. Stephen P. Balog

Dear Sir:

I am writing to ~~not~~ protest your decision to revoke the foster care home license of Mr. Greg Durham at 5027 NE 19th Ave., Portland. You state in your letter that it is upsetting for elderly residents to have to move; ~~XXXX~~ well it is extremely upsetting for me to contemplate a move too. Especially since the other foster care homes my relatives checked on in this part of town were totally inadequate to my needs. I am finally starting to get settled in here. My health is starting to stabilize; my dialysis is going fine; my blood sugars are OK; I've got my provider and his employees trained and you want me to move and do it all over again.

My sisters and father and mother are satisfied with this place (it's a palace compared to the other places in north and northeast portland) and I am too. Please don't make me leave.

Sincerely:

William R. Bonds

William R. Bonds
284-7694

Dear Sir:

Oct 14

This is a nice house, it is kept
very clean. The rooms are kept
clean. The meals are good and delicious.
The manager does a good job
keeping things organized. The grounds
are kept clean, I like staying
here.

Ronald Fiddament

10/11/12

Serve

I live overy He a man
he a cook he does
the food is overy good
he dove theng for us

Richard a gate

3/31/93 We received an anonymous letter saying:

1. even though Greg wrote us a plan for him never being alone with the residents he has no such plan--he's just good at playing a game, saying he will hire nurses or other people.
2. Greg plans to do all the cooking, cleaning and care providing of the residents himself.
3. Betty has many mental problems, allows Greg to use her and manage her money.
4. Greg made Betty leave when he wanted another girlfriend, then he let Betty move back in so she would be in the home when ACHP staff came by.
5. Greg has a criminal record of drug conviction and raping a young woman in his care.

4/6/93 Adm. conf. with Steve and Greg regarding Greg's criminal record and sexual exploitation of a woman in his care.

4/24/93 Greg and Betty take in first over-65 resident, Vernon Cook.

5/17/93 Betty called Eileen asking if they can take elderly or women. Eileen said no, wait a year.

6/93 Eileen learned that Jill Nave, case manager, had placed an elderly man (Vernon Cook) in the home. Eileen called Greg and told him he could have no elderly residents.

6/30/93 Eileen told Greg not to accept elderly residents. Jill Nave had already placed one in his home. Eileen told him not to accept anymore.

7/14/93 Greg takes in 2nd over-65 resident, Joe Carter.

7/15/93 Raymond Fox, DSO, is placed in the home.

7/27/93 Greg called Eileen to request an exception for a Class III resident--denied.

7/30/93 Greg takes in 3rd over 65 resident, Alvin Olsback.

8/6/93 Richard Yates (DD) is placed in the home by his father. There are now 6 residents. DD case manager Valarie Stoney has no idea there are 6 residents. She has no other DD residents in the home.

8/19/93 Raymond Fox's case manager, Terry Andrews, finds out that Raymond does not want to be in Greg's home anymore and does not even want DSO services at all. Raymond had left the home sometime earlier to visit a friend and never came back.

8/20/93 Alexis Cauble calls Greg. Greg says he has no vacancy. Terry Andrews grabs the phone and tells Greg she learned that Raymond Fox is not coming back so now he does have a vacancy. Terry has no idea that there are already five other residents in the home. So Greg takes in Ron Fiddament, again making it 6

residents in his home.

8/26/93 Ron Fiddament leaves home for 1 or 2 days, in jail, comes back again.

9/1/93 Greg called Eileen about a problem with his 67 year old resident (Joe Carter) who was alcoholic. Eileen again told him not to take elderly residents, it was a violation of the conditions on his license.

9/3/97 Kathy Millan visited the home. She found:

1. Greg and Betty were there.
2. There were 6 residents.
3. Greg said Alexis Coble referred the sixth resident to the home knowing it was full. Greg's progress notes for the sixth resident show Greg told Alexis he had a vacancy.
4. Kathy checked with Alexis, she said she was told one resident was permanently gone.
5. Greg later accepted back the resident who had moved out.
6. Greg and Betty admitted knowing it was wrong to have six residents.
7. Greg appeared to be lying.

9/7/93 Eileen noted that our registry reflects Greg's AFH as a SDSO home for elderly. The registry actually just says Greg has a SDSO contract which is needed to receive payment for either elderly or DSO residents.

9/10/93 Adm. Conf. with Steve, Eileen, Kathy, Greg and Betty.

1. Greg admitted his 3 elderly residents came to his AFH on the following dates:

Vernon Cook 4/24/93

Joe Carter 7/14/93

Alvin Olsback 7/30/93

2. Greg said that a resident left the AFH to spend the night with a friend and did not return for a few weeks, and in the meantime another resident came to the AFH. Greg first noticed he had six residents when he had no place to sit at breakfast.

3. Betty and Greg said Kathy and Eileen told them they could take in elderly residents. (It is true Kathy and Eileen told them this at the initial P.I.)

4. Betty and Greg said they thought the license had a typo when it said DD/DSO only.

5. Betty and Greg blamed Cheryl Morgan for referring six residents to them.

6. Greg said he called Eileen twice for exceptions for elderly. Eileen denied the exceptions. So then he called Heather for the exceptions.

7. Greg said his elderly residents could run up and down stairs.

10/1/93 Steve sent Greg and Betty a certified letter revoking their license.

10/13/93 Joan called Greg. He said he had received a notice from the post office of a certified letter. Joan told him to go pick it

MEETING DATE: FEB 17 1994

AGENDA NO: R-3

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

Resolution for Termination of Certain Prior IGA's Between
Multnomah County and the City of Portland Governing Cable
SUBJECT: ~~Franchise Administration in Unincorporated County Areas.~~

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 15 minutes

DEPARTMENT: Nondepartmental DIVISION: Commissioner Sharron Kelley

CONTACT: Robert Trachtenberg TELEPHONE #: 248-5213
BLDG/ROOM #: B106/R1500

PERSON(S) MAKING PRESENTATION: Robert Trachtenberg/Chip Lazenby

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

BOARD OF
COUNTY COMMISSIONERS
1994 FEB 10 AM 9:43
MULTNOMAH COUNTY
OREGON

SIGNATURES REQUIRED:

ELECTED OFFICIAL: Sharron Kelley

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 Copy of Resolution 94-26 sent to Robert Trachtenberg
& Chip Lazenby.

BEFORE THE BOARD OF COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

In the matter of the termination of)
certain prior Intergovernmental)
Agreements between Multnomah County) **RESOLUTION**
and the City of Portland governing) **94 - 26**
cable franchise administration in)
unincorporated County areas)

WHEREAS, in 1985 the Board of Commissioners for Multnomah County authorized an intergovernmental agreement (County No. 4003786/City No. 22673; dated November 25, 1985) between the City of Portland and Multnomah County under which the City and County agreed to certain terms for treatment of residential cable television services, cable access, and treatment of franchise fees in annexed and unincorporated east City and east County areas subject to cable franchises originally issued to Rogers Cablesystems and now operated by Paragon Cable; and

WHEREAS, in 1988 the Board of Commissioners for Multnomah County authorized an intergovernmental agreement between the City of Portland (authorized by City of Portland Ord. No. 161368) and Multnomah County under which the City was assigned regulatory responsibility (including collection of franchise fees) for the cable television franchise issued by the Multnomah County to TCI Cablevision of Oregon, Inc on June 25, 1987; and

WHEREAS, on February 11, 1993, the Board of Commissioners for Multnomah County authorized an intergovernmental agreement ("CCCC IGA") with the cities of Fairview, Gresham, Portland, Troutdale and Wood Village establishing the Consolidated Cable Communications Commission ("CCCC") in order to provide for the joint regulation of cable communications throughout Multnomah County; and

WHEREAS, the 1993 CCCC IGA provides for joint administration, collection of franchise fees, and budgeting by the CCCC on behalf of all participating jurisdictions; and;

WHEREAS, the 1993 CCCC IGA has made the prior 1985 and 1988 intergovernmental agreements between the City and the County unnecessary because the matters addressed in the prior intergovernmental agreements are now addressed within the framework of the CCCC IGA; and

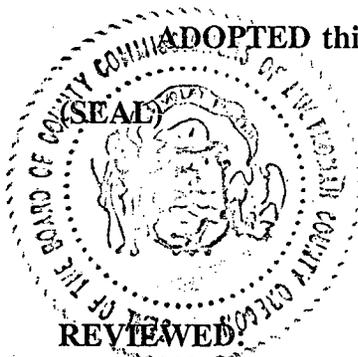
WHEREAS, the 1985 intergovernmental agreement requires a notice period of 60 days for termination and the 1988 intergovernmental agreement requires a notice period of 30 days for termination; and

WHEREAS, the County and the City mutually desire to provide the necessary notification to the other party to cause the 1985 and 1988 intergovernmental agreements to terminate by mutual agreement, leaving the 1993 CCCC IGA (with any subsequent amendments) as the operative document for cable franchise administration for all participating jurisdictions.

NOW, THEREFORE, THE BOARD OF COUNTY COMMISSIONERS RESOLVES:

1. The Board approves the termination of the 1988 intergovernmental agreement between the City of Portland (authorized by City of Portland Ord. No. 161368) and Multnomah County under which the City was assigned regulatory responsibility (including collection of franchise fees) for the cable television franchise issued by the Multnomah County to TCI Cablevision of Oregon, Inc on June 25, 1987.
2. The Board approves the termination of the intergovernmental agreement (County No. 4003786/City No. 22673; dated November 25, 1985) between the City of Portland and Multnomah County under which the City and County agreed to certain terms for treatment of residential cable television services, cable access, and treatment of franchise fees in annexed and unincorporated east City and east County areas subject to cable franchises originally issued to Rogers Cablesystems and now operated by Paragon Cable.
3. All funds under the terminated 1985 and 1988 intergovernmental agreements allocable to unincorporated Multnomah County within the Paragon and TCI franchise areas will be recognized, for purposes of the CCCC IGA, as Multnomah County funds.

ADOPTED this 17th day of February 1994.



By Beverly Stein
Beverly Stein, Chair
Multnomah County, Oregon

Laurence Kressel
Laurence Kressel, County Counsel
Multnomah County, Oregon

MEETING DATE: FEB 17 1994

AGENDA NO: R-4

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: RESOLUTION

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: 2/17/94

Amount of Time Needed: 5 Minutes

DEPARTMENT: Nondepartmental DIVISION: County Chair's Office

CONTACT: Meganne Steele TELEPHONE #: 248-3308
BLDG/ROOM #: 106/1410

PERSON(S) MAKING PRESENTATION: Chair Stein, Meganne Steele

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

RESOLUTION in the matter of endorsing the Portland-Multnomah County Progress Board Benchamrks for the Community.

BOARD OF
COUNTY COMMISSIONERS
1994 FEB 10 PM 12:02
MULTNOMAH COUNTY
OREGON

SIGNATURES REQUIRED:

ELECTED OFFICIAL: Beverly Stein

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Copys of Resolution 94-27 (only) sent to Meganne Steele on 2-17-94.*

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

In the Matter of Recommending Endorsement)
of the Portland-Multnomah County Progress) RESOLUTION
Board Benchmarks for the Community) 94-27

WHEREAS benchmarks are quantified targets for specific, quality of life conditions which our community is striving to realize in the future; and

WHEREAS benchmarks are a powerful tool communities can use to focus efforts for long-term results and to create partnerships to solve problems; and

WHEREAS local support is needed to achieve benchmarks adopted at the state and community levels by the Oregon Progress Board and the Portland-Multnomah County Progress Board, respectively; and

WHEREAS the Portland-Multnomah County Progress Board is Co-Chaired by the Multnomah County Chair and input in development of the community benchmarks has been provided by the Multnomah County Board of Commissioners, elected Department Heads and managers, and County citizens;

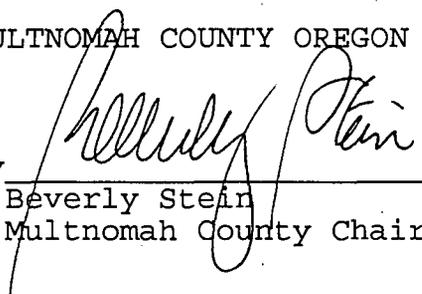
NOW THEREFORE IT IS RESOLVED that the Board of County Commissioners hereby endorses as a framework for community action the Community Benchmarks developed by the Portland-Multnomah County Progress Board which are attached to this Resolution as Attachment A.

APPROVED this 17th day of February, 1994.



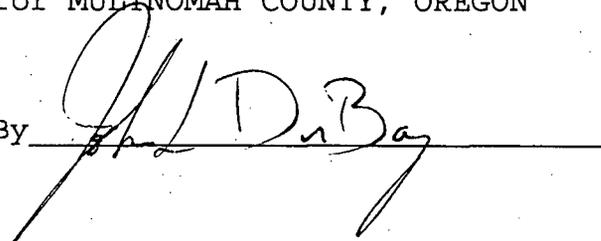
MULTNOMAH COUNTY OREGON

By


Beverly Stein
Multnomah County Chair

REVIEWED:
LAURENCE KRESSEL, COUNTY COUNSEL
for MULTNOMAH COUNTY, OREGON

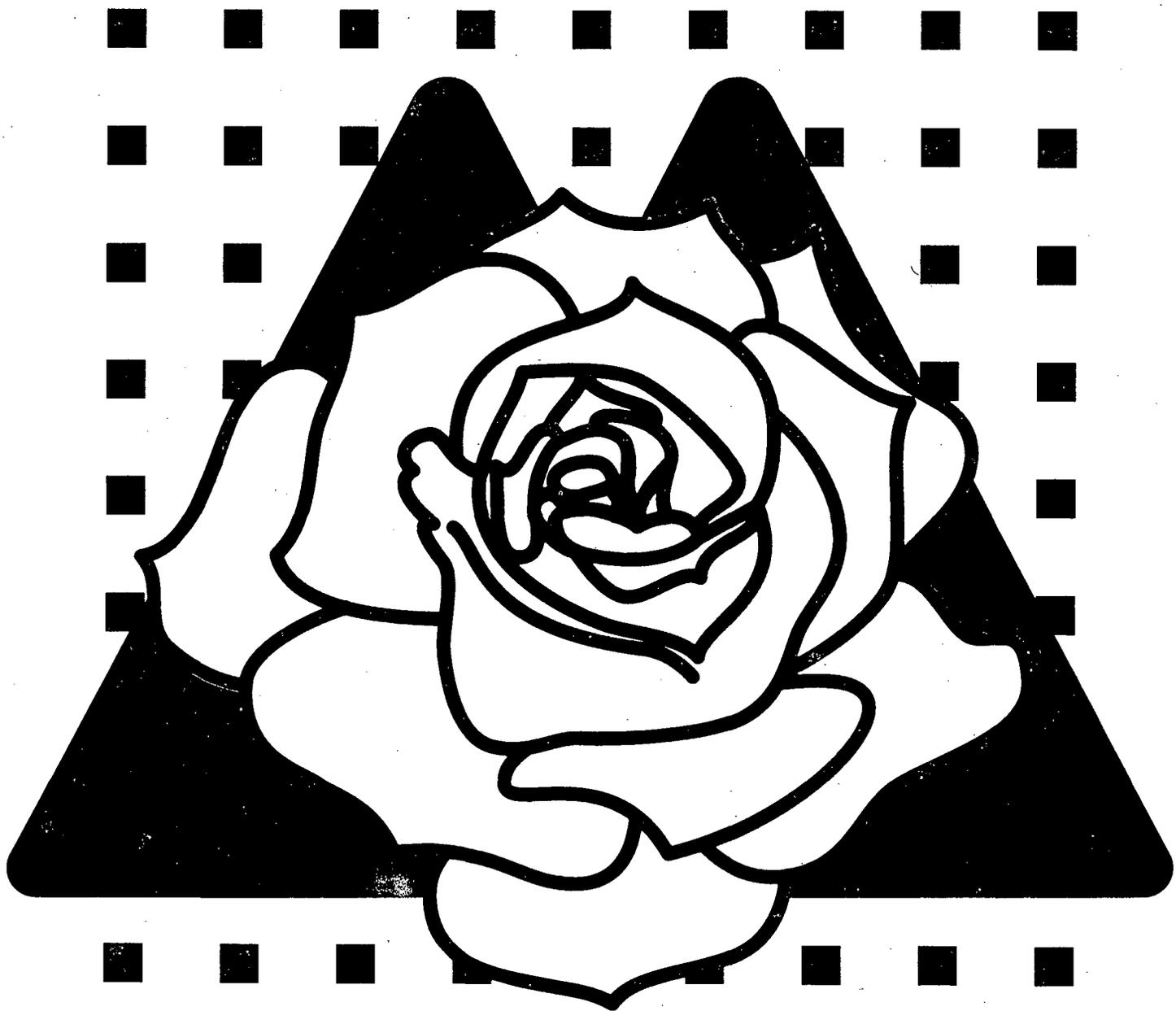
By



PORTLAND-MULTNOMAH COUNTY BENCHMARKS

STANDARDS FOR MEASURING COMMUNITY PROGRESS AND
GOVERNMENT PERFORMANCE

PREPARED BY
THE PORTLAND-MULTNOMAH COUNTY PROGRESS BOARD
JANUARY, 1994



**PORTLAND-MULTNOMAH COUNTY
BENCHMARKS**

STANDARDS FOR MEASURING COMMUNITY

PROGRESS AND GOVERNMENT

PERFORMANCE

January, 1994

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**Portland-
Multnomah
County
Progress
Board**



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January, 1994

Dear Citizen:

Four months ago we recognized the need to build upon the community visions created through Portland Future Focus and the Multnomah County Visioning projects by creating the Portland-Multnomah County Progress Board. The Progress Board was charged with establishing benchmarks for maintaining and enhancing our quality of life, and monitoring how the community is performing on key benchmarks of social and economic well-being. This document is the result of four months work on these critical measurements of the community's vitality.

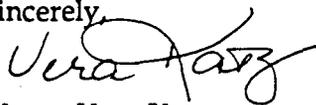
The Portland-Multnomah County Progress Board realized the opportunity in the next 10-20 years to achieve sustained economic prosperity while enhancing the community's quality of life. We acknowledged that a shared effort between government, businesses, community organizations and citizens is needed to anticipate future change and address the broad range of issues that will impact our future.

These community benchmarks (measurements by which the community can measure the results of its efforts) will strengthen our ability to achieve our vision for the future. The benchmarks aim to keep key institutions and organizations pointed towards critical priorities over an extended period of time, and will assign accountability for results. The benchmarks provide a community focus as we work together to refine program strategies, re-evaluate our policies, and build alliances within the community. Most importantly, we hope these benchmarks become common language that invite public discussion about broad quality of life issues.

The community's vision and benchmarks challenge citizens and leaders to anticipate change rather than react to current crisis. A broad level of community participation is necessary for success. Success will require a shared effort between government, business, community organizations and citizens. Every element of the community can play a meaningful, important part in implementation.

The City of Portland and Multnomah County are pleased to be working together and planning in ways that will allow us to quantifiably measure our community's vitality. We look forward to working with community citizens in creating the future we have envisioned.

Sincerely,


Mayor Vera Katz
Co-Chair


Mult. Co. Chair Beverly Stein
Co-Chair

INTRODUCTION

Welcome to the Portland-Multnomah County benchmarks! This is the first of what will be many reports on the community's progress as a place and as a people. Benchmarks are indicators of progress that tell us whether or not we are achieving our long range strategic goals. They are really the "vital signs" of our community--a checklist of our social, economic, and environmental health. These benchmarks will allow us to measure the results of our efforts, to achieve the vision of Portland and Multnomah County as one of the most attractive communities in the nation.

While the community currently boasts a high quality of life, it will be influenced by a broad range of events and trends on the international, national, state, and local levels. These trends provide unique opportunities as well as threats to the community's historic livability. Although Portland will remain the region's economic and cultural center, rapid population and economic growth is occurring mostly in the thriving, smaller cities and communities surrounding Portland. This growth is straining environmental quality, public infrastructure, and social service delivery. It is increasingly forcing problems and policy issues across jurisdictional boundaries, requiring cooperation between the many governments and communities in the region.

In the face of these changes and in a time of diminishing resources, we must plan to achieve a prosperous future. Portland and Multnomah County are nationally recognized for the innovative planning of its citizens and leaders. The community has never been willing to accept any change that unfolds; citizens have always challenged themselves to shape their own destiny. This time, though, the City and County together are planning in ways that will enable us to quantifiably measure our progress. We are using benchmarks. They allow us to identify where we are, where we want to be, and to set priorities for our budgets to get the results we want. Planning must involve monitoring and accountability. The community is now committed to both through the Portland-Multnomah County benchmarks.

DEVELOPMENT OF THE BENCHMARKS

The Portland-Multnomah County benchmarks have a history. They are built upon Oregon's strategic planning effort of the late 1980s that focused on making Oregon economically stronger and more globally competitive as it came out of a long recession. As leaders raised questions about how to guide and reshape the Oregon economy, they realized that more than jobs were at stake. A strong economic base, made possible by strong industries, family wage jobs, and skilled workers, enriches the quality of life. The resulting plan that said it all was *Oregon Shines*. It envisions that by the year 2010, we can distinguish Oregon as one of the few places that has maintained its natural environment, built communities on a human scale, and developed an economy that provides well-paying jobs to its citizens.

In 1990, the State took *Oregon Shines* a step farther. The Oregon Progress Board was created and charged with designing a way to monitor the State's progress of the plan. They came up with the Oregon Benchmarks--statements that tangibly tell us what we have or have not achieved. Benchmarks place a priority on measuring results, such as adult literacy, rather than efforts. Outcomes are a more telling sign of achievement than are programs and expenditures that aim to achieve outcomes. They tell us whether our strategies are working to get results. By focusing on and monitoring the outcomes, community leaders and citizens can reset priorities and adapt and modify programs as they learn what works!

In the spirit of *Oregon Shines*, the City of Portland and Multnomah County each launched similar planning efforts. In 1991, Mayor Bud Clark introduced *Portland Future Focus*, a community-based strategic plan to carry Portland into the 21st Century. The 1989 Multnomah County *Visions* (updated in 1992) was a citizen inspired effort documenting the values of its residents and strategic issues facing the County. Each challenged its citizens and leaders to anticipate change rather than react to current crises. Each focused on what citizens valued most about their communities. Each concentrated on quality of life issues by focusing on children, on jobs, on housing, and on building a strong sense of community. Most importantly, each recognized that to achieve the visions and goals, the effort must be shared between government, businesses, community organizations, and citizens. Every person can play a meaningful, important part.

These two plans have merged as we realized that neither Portland nor the region's cities and counties can continue to focus solely on their own interests. Portland and Multnomah County now have a common vision--a community vision--that is linked to benchmarks. Strategic goals describes what our direction, as partners, must be while the benchmarks are the common language that will bind agencies, schools, businesses, and community organizations together. Using them will tell us whether our efforts are paying off.

VISION FOR THE FUTURE

Entering the 21st Century, the community of Portland and Multnomah County has a rich environment that blends respect for the environment, our history, and cultural diversity and makes it one of the most attractive communities in the nation. Portland is recognized as the central city with a strong urban environment within a county interconnected by smaller, but thriving cities and preserved natural forested land. Innovative approaches to problem-solving and strong partnerships between government, schools, business, and community organizations have helped the community set priorities and effectively direct limited resources to solve the most pressing problems. Neighborhood and community level action involves people in setting the destiny of their own neighborhoods and gives them a sense of responsibility and ownership for their community.

Lifelong education is among the highest community priorities. Portland and Multnomah County lead the nation with the lowest dropout and highest literacy rates. The school system has developed curriculum that provides students the necessary skills to make decisions, work with diverse groups of people, and build a stronger economy. Students develop an appreciation of the arts, humanities, and foreign cultures and languages. Businesses continually work with educational institutions to develop education, training, and re-training for existing and projected employment needs. Business finds well-educated, talented workers among graduates of the community's institutions.

The community has capitalized on the globalization of business and is a West Coast leader in Pacific Rim trade. Support for small business creation and development has strengthened the strong economic base that provides family-wage jobs. Appreciating the high quality of life has led businesses to invest in pollution prevention, waste reduction, and energy conservation. Responsible businesses often incorporate open spaces and natural areas into developmental projects and win the respect of citizens for involving them in the process of identifying, developing, and planning appropriate sites for business needs. A clear, streamlined public policy and permit structure has further stimulated business efforts.

Diverse populations have become economic, cultural, and social assets and are integrated into all areas of the community. Cooperation among city and county government, neighborhoods, schools, and the business community has resulted in community-based programs to serve the social needs of families. These programs are tailored to the respective needs of each neighborhood. Adequate and accessible health care, child care, and increased rehabilitation of existing housing and construction of affordable housing have contributed to strong, stable, safe neighborhoods. Empowered residents work within their neighborhoods to prevent unwanted and illegal activity and support their youth. Crime has decreased, especially in the poorer areas of the city.

Regional growth has been effectively managed and has resulted in the efficient use of land. Regional planning and cooperation maintains the central city and other downtowns throughout the region, supports efficient municipal infrastructure, and enhances open space, natural areas, and parks. A strong regional government, based on neighborhood and city governments who work with their county, has emerged and provides appropriate services to the metropolitan area. The region has a coordinated transportation network that includes efficient mass transit and well-maintained streets and roads. Public and private initiatives have resulted in cleaner air and water. Increased communication between governments has led to clearly defined roles between urban, suburban, and rural levels of service that more efficiently and effectively serves the needs of its citizens.

Portland and Multnomah County remains unique in the nation for its accessible environment including parks, open space, and natural areas. Portland is respected nationally as an incubator of high-quality arts. Diverse cultural and community events are accessible to all citizens. The community supports a wide range of recreational programs for all ages. Open spaces and natural area systems provide close-to-home recreational activities for all people.

BENCHMARKING PROCESS

In August, 1993, City of Portland Mayor Vera Katz and Multnomah County Commission Chair Beverly Stein, appointed the Portland-Multnomah County Progress Board. The 16-member Progress Board was charged with reviewing the Oregon Benchmarks, the community vision and goals of Portland Future Focus, and the Multnomah County Vision to establish benchmarks for maintaining and enhancing the community's quality of life. These benchmarks would place a priority on measuring results rather than efforts.

Five task forces were appointed to assist the Portland-Multnomah County Progress Board in drafting benchmarks in five major areas. They were:

- Economic Development
- Education/Children & Families
- Environment/Quality of Life
- Governance
- Public Safety

Each task force consisted of approximately 20 citizens who were knowledgeable in their respective areas and demographically representative of the community. They completed their work in late August and began reporting to the Progress Board in early September.

The benchmarks were reviewed and refined by the Progress Board. The completed list of draft benchmarks were presented for prioritization to the community through a series of meetings from October through December of 1993. "Urgent Benchmarks" were identified through electronic voting at these meetings. "Urgent Benchmarks" are those short-term, "short-list" benchmarks that will help the community address pressing problems or needs in the next few years. This list is expected to change over time as we achieve results and identify new challenges and opportunities.

This document is the finalized list of benchmarks adopted by the Portland-Multnomah County Progress Board in early January, 1994. These benchmarks will guide the community's long term efforts in achieving our vision. Baseline indicators (where we are now in each of these benchmarks) and targets for each of these benchmark areas are expected to be determined by Spring, 1994.

The benchmark development process should not be viewed as a one-time isolated event. The benchmarks will be continuously reviewed and refined in the coming years as we work to implement data collection, monitoring and reporting systems. There will be an annual review and revision of the benchmarks and a report will be delivered to the community by the Progress Board in November of each year.

WHAT ARE BENCHMARKS?

Benchmarks are indicators of progress that tell us whether or not we are achieving our long range strategic goals. They have also been called "vital signs," a checklist of the community's social, economic and environmental health.

Benchmarks are most useful when they have a practical connection to strategic goals and when they can be measured easily and uniformly by those responsible for keeping track of them. Here is a checklist of important benchmark characteristics:

- ◆ **An emphasis on results.** This is unquestionably the most important characteristic of any benchmark. Benchmarks should place a priority on measuring results (for example, adult literacy) rather than efforts (the amount of money spent on literacy education). Outcomes are a more telling indicator of achievement than programs and expenditures intended to achieve outcomes. By staying focused on outcomes, and by keeping track of results, the community can reset priorities and adapt and modify programs as they learn what works. Occasionally, however, input benchmarks (such as per capita expenditures on public infrastructure) provide a reliable indicator of progress.
- ◆ **Comparability.** Benchmark measures should be comparable, as much as possible, with other like jurisdictions.
- ◆ **Long-range reliability.** Benchmarks should be reliable over long periods of time, up to two decades or more, a typical horizon for strategic planning.
- ◆ **Accessibility.** Benchmark data should be reasonably easy to gather and analyze at periodic intervals (a year, two years, five years).
- ◆ **Documentation.** Benchmarks should come from credible sources, whether primary (official records or commissioned research) or secondary (published research by others). It is helpful to append endnotes or footnotes to benchmarks which provide users additional rationale, measurement criteria, and source information for each benchmark.

TYPES OF BENCHMARK MEASURES

There are several different kinds of benchmark measures. Some are directly obtainable from official sources. Some are based on physical measurement (such as ambient air quality, traffic, or water quality). Other measures are based on surveys which test a sample of the population. Some survey particular knowledge and skills, others survey base information.

HOW BENCHMARKS FIT PLANNING

Benchmarking adds a new dimension to strategic planning. First, through benchmarking, data is collected that can be used for analysis. Second, people from different political parties, jurisdictions, and communities have less trouble agreeing on measurable outcomes than they do on the more general visions of the future. Third, benchmarks can be incorporated into other systems of government and community organizations, especially the budgeting system. Fourth, benchmarks stimulate the collaboration of all community sectors (public, private, not-for profits) in achieving these benchmarks. And finally, because the measures extend over time, they provide to planning a continuity that might otherwise be lost.

WHAT IS A PERFORMANCE MEASURE?

Performance measures gauge the specific success of a particular organization's efforts. They are a tool used to compare agency outcomes with overall agency mission and community benchmarks. They assist agencies in program prioritization and in communicating their achievements to the public.

Performance measures of both efficiency and effectiveness should compare current results to related private sector results, other communities, other states, or the agency's own history. Efficiency measures focus on the amount of work accomplished and what the cost per unit of output was. Effectiveness measures the quality of the task accomplished and customer satisfaction with the task performed.

URGENT BENCHMARKS

The purpose of the Portland-Multnomah County Benchmarks is to translate the vision and goals of Portland and Multnomah County into measurable attainments. Among the benchmarks in this report, a number will serve as critical measures of the community's human, environmental, and economic well-being over the next 20 years. These are the community's *Urgent Benchmarks*.

Urgent benchmarks are those short-term, "short-list" benchmarks that will help the community address pressing problems or needs in the next few years. These eleven Urgent Benchmarks were selected through a series of community meetings in late 1993. All of these benchmarks are considered to be equally critical to our future. If we do not make progress in the next five years on these benchmarks, which are leading indicators of others, there is a very real danger that many other benchmarks will not be achieved one or two decades out. This priority list will change over time as we achieve results and identify new challenges and opportunities.

Family Wage Jobs

As the community makes progress toward a variety of our economic goals, the earning of our workers should improve dramatically. As we progress towards increased incomes, we must make sure that those who have historically lower incomes are not left behind.

PERSONAL INCOME	1980	1990	1992	1995	2000
Average annual payroll per worker (all industries). #3*					

BALANCED INCOME DISTRIBUTION	1980	1990	1992	1995	2000
Percentage of citizens with incomes above 100% of the federal poverty level. #6					

* Benchmark number within document

Nurturing Families, Stable Homelife

Portland and Multnomah County's future must be founded on stable families with economic means to provide food, shelter, and clothing. We must make sure that each child is ready and able to learn. The child most ready to learn and excel is the child that has food, shelter, clothing and a nurturing family.

STABLE HOMELIFE	1980	1990	1992	1995	2000
Percentage of children 0-17 living above 100% of the poverty level. #30					
A. 0-4 yrs. old					
B. 5-17 yrs. old					
C. African-Americans (0-17)					
D. American Indians (0-17)					
E. Asian-Americans (0-17)					
F. Hispanics (0-17)					
G. Whites (0-17)					

Education and Work Force Preparation

The community will need the best educated work force in the nation by the year 2000, and one equal to any in the world by 2010. Our goal is to develop a population with increasing percentages of highly educated, literate citizens who are capable of adapting to the challenges of a rapidly changing global economy. It is imperative that we concentrate on raising the standards for education.

ACADEMIC ACHIEVEMENT	1980	1990	1992	1995	2000
Percentage of students who achieve established skill levels. #37					
A. OVERALL					
1. African-Americans					
2. American Indians					
3. Asian-Americans					
4. Hispanics					
5. Whites					

B. THIRD GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organization					
5. Writing-conventions					
C. FIFTH GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organizations					
5. Writing-conventions					
6. Composite reading & math					
7. Composite writing skills					
D. EIGHTH GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organizations					
5. Writing-conventions					
E. ELEVENTH GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organization					
5. Writing-conventions					
6. Composite reading & math					
7. Composite writing skills					

Health & Health Care

Health care affordability is essential to each citizen's well being and quality of life. Citizens must be able to have adequate health care at a reasonable cost. A lack of economic access to health care threatens both health and self-sufficiency, and imposes greater future costs on all community members.

HEALTH CARE ACCESS	1980	1990	1992	1995	2000
Percentage of citizens who have economic access to basic health care. #44					
A. African-Americans					
B. American Indians					
C. Asian-Americans					
D. Hispanics					
E. Whites					

Livable Community

The community values our quality of life. A true indicator of our special livability is people feeling a sense of belonging, knowing their neighbors, and identifying with their neighborhood. People feeling a sense of belonging and identity in their neighborhood will hopefully make them more willing to share the responsibility for their neighborhood.

SENSE OF COMMUNITY	1980	1990	1992	1995	2000
Percentage of people who feel a sense of community in their neighborhood. #66					

Citizen Satisfaction with Government

Citizens value open and honest government. This can only be achieved through effective and responsive citizen involvement and interaction with government. Rebuilding government trust must be included as a top community priority.

CITIZEN SATISFACTION WITH GOVERNMENT	1980	1990	1992	1995	2000
Percentage of citizens who are satisfied that services are necessary, responsive and cost-effective. #76					

Efficient Government

In these times of diminishing resources with increasing demands for services, it is important to measure the cost of government services per citizen. Government accountability is a top community priority.

PUBLIC FINANCE	1980	1990	1992	1995	2000
Per capita cost of government. #83					

Public Safety

Citizens feeling they live in an environment where it is safe to enjoy all aspects of the community, twenty four hours a day, is a key indicator for quality of life. It is critical to address these issues in a crime prevention manner that involves citizens and public agencies. Citizens feeling safe, reduction in crime statistics, especially those involving families, are the fundamental measures for the community's public safety.

SENSE OF COMMUNITY	1980	1990	1992	1995	2000
Percentage of citizens who feel safe and secure. #85					

DOMESTIC VIOLENCE	1980	1990	1992	1995	2000
Number of reported incidents of domestic violence including. #86					
A. Children abused and neglected per 1,000 people under 18					
B. Spouses or domestic associates abused per 1,000 people					
C. Elderly abuse per 1,000 people					
D. Families repeatedly victimized by such incidents.					

REPORTED CRIMINAL ACTIVITY	1980	1990	1992	1995	2000
Number of reported crimes against people per 1,000 population. (These crimes include: murder, rape, robbery, kidnapping, assault.) #89					
A. Arrests of people under 18 years of age					
B. Arrests of people over 18 years of age.					

Economy

VALUES

We value a strong, varied, adaptive, and globally-based economy that is compatible with the community's environmental values.

We value an economy that creates community wealth and supports public and private facilities and services.

We value an economy that provides employment and economic choices for individuals and families.

We value planned growth which provides for efficient, adequate infrastructure and public services.

TRENDS

- ◆ Income in Portland and Multnomah County lags behind the rest of the region on both a per capita and family basis. During the 1980s, income in both Washington and Clackamas Counties surpassed that in Multnomah County and this gap is likely to grow.
- ◆ The nature of the region's economy is changing. The service sector is becoming a major force in the economy, smaller employers are providing most of the new jobs, work is becoming more information intensive, and both markets and competition have become global in scope.
- ◆ Population growth and increasing trade with the Pacific Rim will be the major factors driving economic growth in the region. International trade, investment, business, and travel will become increasingly important to the community.
- ◆ State and local tax structures will reduce Portland's economic competitiveness within the region and nationally.

GOALS

- ◆ **Grow and attract internationally competitive companies that support well compensated jobs with long term potential.**

Portland and Multnomah County's economic history has been tied to its location. Located at the confluence of two major rivers, with a major Port, access to the Pacific Ocean, and an abundance of fields and forests, the community has been a producer and a point of distribution to locations throughout the world. The community needs to build upon its strength and attract companies with international ties and nurture existing businesses providing family wage jobs to develop their international markets.

- ◆ **Build a world-class workforce that provides the full range of skills necessary to attract and sustain competitive, high performance companies.**

Workforce development plays a central role in business development. New jobs in the future will demand much higher skill levels than the jobs of today. Good jobs will belong to those who have skills that enable them to be productive in a high-skill economy. The Portland metropolitan region will have a highly productive, high wage economy only if they have an educated, well trained, prepared workforce meeting the needs of business.

- ◆ **Ensure that all residents, particularly low-income and unemployed people, have the opportunity to benefit from business growth.**

The community must provide high quality education and training for all sectors of the population. Workforce development programs must have superior accessibility, particularly in targeted low-income neighborhoods.

- ◆ **Foster and create vital neighborhoods with affordable housing and healthy commercial districts.**

Community leaders should support healthy neighborhoods by promoting safe and decent housing, economic activity that provides well paying jobs, successful small businesses in neighborhood commercial zones, diversity of resident populations, and strong neighborhood-based organizations.

BENCHMARKS

Standard of Living

PERSONAL INCOME	1980	1990	1992	1995	2000
1. Income per capita as a percentage of U. S. real per capita income.					

As the community makes progress toward a variety of its economic goals, the earnings of residents should improve dramatically.

PERSONAL INCOME	1980	1990	1992	1995	2000
2. Per capita income as a percentage of Oregon's real per capita income.					
A. African American					
B. American Indians					
C. Asian Americans					
D. Hispanic Americans					
E. White Americans					

As the community progresses towards increased incomes, it is important to make sure that those who have historically had lower incomes are not left behind.

PERSONAL INCOME	1980	1990	1992	1995	2000
3. Average annual payroll per worker (all industries).					

This is a complement to the per capita income benchmarks. It shows how each worker is faring, rather than just charting personal income (which may include two worker families).

PERSONAL INCOME	1980	1990	1992	1995	2000
4. Per Capita income					

This benchmark underscores the need to improve the overall competitiveness of the community's industries. Improved competitiveness should lead to growth in the industry, including increasing employment and payroll. This benchmark underscores the need to improve resident's wages through increasing their skills and productivity.

PERSONAL INCOME	1980	1990	1992	1995	2000
5. Annual total payroll					

This benchmark underscores the need to improve the overall competitiveness of the community's industries. Improved competitiveness should lead to growth in the industry, including increasing employment and payroll. This benchmark also underscores the need to improve resident's wages through increasing their skills and productivity.

BALANCED INCOME DISTRIBUTION	1980	1990	1992	1995	2000
6. Percentage of citizens with incomes above 100% of the federal poverty level.					

This benchmark highlights the community's ability to increase the skills and employability of those in poverty and to add them to the work force in jobs that provide incomes greater than the poverty level.

EMPLOYMENT	1980	1990	1992	1995	2000
7. Total employment (in thousands).					
A. African American					
B. American Indians					
C. Asian Americans					
D. Hispanic Americans					
E. White Americans					

This benchmark sets the minimum standard to provide employment opportunities sufficient to employ residents when they are ready to enter the labor force. This measures the level of employment by ethnicity relative to each ethnic group's share of the total population.

EMPLOYMENT		1980	1990	1992	1995	2000
8.	Unemployment rate (as compared to the Portland Metropolitan region.)					
	A. African American					
	B. American Indians					
	C. Asian Americans					
	D. Hispanic Americans					
	E. White Americans					

This is a complement to the employment benchmark. It shows how the community is doing in providing jobs for all workers ready to enter the work force.

Diverse and Productive Industry

DIVERSIFICATION		1980	1990	1992	1995	2000
9.	Percentage of income from goods and services sold outside of the United States.					

The reduction of international trade barriers has resulted in a growing importance of international trade to the United States, especially to the Portland metropolitan area. To survive in this more global marketplace, the area will need to take advantage of opportunities in newly opened international markets, thus increasing exports of manufactured goods.

DIVERSIFICATION		1980	1990	1992	1995	2000
10.	Percentage of income from goods and services sold outside the Portland Metropolitan region.					

This benchmark will show the total economic base for Portland and Multnomah County including domestic as well as international activities. (are faring in the global marketplace as compared to the rest of the region.)

SMALL BUSINESS		1980	1990	1992	1995	2000
11.	Number of small businesses that fail in:					
	A. One year					
	B. Two years					
	C. Five years					

Small business is characterized as the base of a healthy economy in Oregon. This measures ease of entry into the market, business vitality, entrepreneurial skills, and innovation.

PRODUCTIVE EMPLOYEES		1980	1990	1992	1995	2000
12.	Percentage of employer payroll dedicated to training and education.					

Continued employer investment in worker development bolsters competitiveness and productivity. As a consequence, it will also help prevent or reduce worker displacement.

PRODUCTIVE EMPLOYEES		1980	1990	1992	1995	2000
13.	Percentage of 25 year olds with a certificate granted from education and training programs.					

This benchmark is an indicator of resident's attainment of a range of skills for self-sufficiency and development through education, training, or life experience following secondary education.

PRODUCTIVE EMPLOYEES		1980	1990	1992	1995	2000
14.	Percentage of employees working in firms which train over 50% of their workforce 20 hours or more annually in work skills or work processes.					

This benchmark measures the overall activity of employers in training and educating their employees (other than safety-related training/education).

EXPERIENTIAL WORK LEARNING	1980	1990	1992	1995	2000
15. Percentage of high school students who are engaged in Certificate of Advanced Master programs that involve work place experience.					

This benchmark measures the success of connecting youth not bound for post-secondary education programs with meaningful, realistic opportunities, and helping them become more self-sufficient.

Access to Markets

AIR TRANSPORTATION	1980	1990	1992	1995	2000
16. Number of U. S., Canadian and Mexican metropolitan areas over 1 million population served by non-stop flights to and from any Oregon commercial airport.					

The ability of companies to compete in regional, national, and global markets will depend in part on their access to affordable air transportation services.

AIR TRANSPORTATION	1980	1990	1992	1995	2000
17. Number of international cities of over 1 million population (outside Canada & Mexico) served by direct or non-stop flights to and from any Oregon commercial airport.					

This measures passenger access to international air transportation and access of business to air cargo services.

MARINE TRANSPORTATION	1980	1990	1992	1995	2000
18. Portland transpacific container export rates compared to those in Seattle & Tacoma (percent greater or less than).					

Container shipping is an important method for exporting goods to world markets. An estimated 80-90% of container exports are to the Pacific Rim.

Capacity for Growth and Expansion

STREAMLINED PERMITS		1980	1990	1992	1995	2000
19.	Percentage of permits issued within the target time period or less:					
A.	Business licenses					
B.	Building permits					
C.	Water					
D.	Plumbing/Electrical/Heating & Ventilating					
E.	Parking					
F.	Street Use					
G.	Conditional Use/Zoning/Variations					

This benchmark measures the government's ability to accommodate companies wishing to locate or expand. The community needs to ensure that the application review process involves enough time for adequate consideration and public input, but is quick enough to facilitate fast-track development as required by companies.

LAND USE		1980	1990	1992	1995	2000
20.	Percentage and number of industrial site acreage identified in comprehensive plans that is actually suitable for development.					

The importance of this benchmark is to ensure that the community's inventory of industrial land, as designated by local comprehensive land use plans, is able to meet the needs of industry.

Healthy Government and Community Organizations

TAXES		1980	1990	1992	1995	2000
21.	Total taxes per capita as percentage of U.S. average.					

This benchmark assumes that the U. S. average of taxes per capita represents a reasonable mix of taxes and a reasonable level of goods and services provided by government.

TAXES	1980	1990	1992	1995	2000
22. Total taxes per \$1,000 income.					

This benchmark measures the amount of incomes committed to providing government goods and services. This relates to Benchmark #20.

TAXES	1980	1990	1992	1995	2000
23. Percentage of federal, state & local business taxes and fees per dollars of business income.					

Taxes are one factor influencing the community's business climate. This benchmark indicates the tax burden of business. However, the tax structure may cause considerable variation in impact among firms.

INFRASTRUCTURE	1980	1990	1992	1995	2000
24. Real per capita capital outlays for public infrastructure.					

The community must maintain its overall investment in public facilities and services if it is to continue to meet economic needs and achieve its goals.

Education/Children and Families

VALUES

We value the right of all the community's citizens to physical, mental, and emotional well-being, including adequate food, shelter, transportation, and health care.

We value quality education that enable all residents to reach their full potential as individuals, workers, and citizens. We also value the social, economic, and civic contributions of strong integrated systems of education.

We value an open and friendly community that is free from bigotry and intimidation. We value a community that welcomes and respects the individual, unique talents, and contributions of all people.

We value efficient and effective delivery of services that emphasize the assets and capabilities of families and communities.

TRENDS

- ◆ Rapid social, economic, and cultural changes are placing increasing demands on our education system at all levels. Drops outs will continue to be a problem.
- ◆ Higher education will continue to be vital for economic development, especially as the demand for technical and scientific degrees increases.
- ◆ Young children, women, and minorities will be the most vulnerable to poverty and will have the greatest need for social services.
- ◆ Demographic changes will dramatically impact the social service system. The population needing human services will become increasingly ethnically and culturally diverse. Portland and Multnomah County has more minorities, elderly, and special needs populations than the rest of the region.
- ◆ At a time when there is increased demand for public services, paying for those services has been made difficult by new limitations imposed on local revenue sources and by reduced federal support to state and local jurisdictions.

- ◆ Services will be more community-based as juveniles, the mentally ill, and developmentally disabled are de-institutionalized. There is increasing interest among corporate, charitable, and government in collaboratively coordinating and providing social services.
- ◆ The lack of access to health insurance; the increasing ability through technological advancements to save neonatal babies, the elderly, and injured persons (alive); and the increased number of AIDS patients will pressure the health care system which is already in crisis.

GOALS

- ◆ **Value children and help them achieve their full potential.**

Services which enhance the health, safety, self-esteem, and skills of children represent the region's best long-term investment. Crime, unemployment, illiteracy, and poverty are just a few consequences of failing to meet the needs of all children. The community can no longer afford to allow any of its children to fall through the cracks and must provide the basic services that help children succeed. Pre-natal care, healthy babies, day care, early childhood education, support for at-risk youth and teens, and health and social services are essential to supporting, nurturing, and protecting our children.

- ◆ **Graduate all children from high school with skills enabling them to succeed in the work force and/or in post-secondary education, including the fundamental ability to read, write, compute, communicate, and reason.**

The community must strengthen its opportunities in the new global economy with well educated and well trained workers. Wages for high school graduates have dropped 40 percent over the past fifteen years. Once high-wage jobs that required relatively low skills have shifted abroad to low-wage countries. At the same time, advanced technology is placing a premium on individuals with fundamental personal skills in communication, problem-solving, and teamwork, and on people with specific capabilities in math, science, and technology.

- ◆ **Establish stronger educational programs beyond the secondary level to meet the region's needs for accessible education, expanded graduate programs, high quality research, technology transfer, and economic development.**

The community has a wide array of post-secondary institutions which individually have great strengths. The community lags behind most metropolitan areas in degrees granted at the undergraduate and graduate level as well as funding for research and development. The system continues to develop a regional library and computer-linked information system. Oregon Health Sciences University as a research center, Portland State University as the urban university, and the community colleges must link their resources and form partnerships for stronger post-secondary institutions.

◆ **Access to basic health care for all citizens.**

Good health enriches individual lives and reduces burdensome costs on society. Both urban and more rural parts of the community must ensure that all populations, especially populations with special needs, have access to adequate health care and that the resources of the community's medical institutions meets these needs. Access to health care increases the quality of people's lives.

◆ **Enable citizens with special needs to live and receive a full range of services throughout the region.**

Most of the region's human and medical services and inexpensive (and subsidized) housing are located within the community. Many people who work in Clackamas and Washington counties at low-wage jobs live in Multnomah County, especially in Portland, because they cannot afford suburban housing. If this pattern continues, the community will experience increasing pockets of poverty. Affordable housing for the poor and people with handicaps or special medical needs should be available in all regional communities with all suburban cities and counties bearing the costs of providing these vital services. Citizens with special needs should be supported in a manner that allows them to live independently and achieve their full potential.

◆ **Make full use of the talents of the elderly and provide excellent human services for them.**

The community should utilize the knowledge, energy, and resources that seniors can contribute. At the same time, as the percentage of the elderly in the population increases, an assortment of technologies, services, and environments must be "retrofitted" to match their changing needs. It should be a priority to provide seniors safety in public and private places, opportunities for life-long learning, affordable housing, accessible transportation, and compassionate, expert medical care and the opportunity to contribute their talents to the community.

BENCHMARKS

Nurturing Families, Thriving Children

EARLY CHILDHOOD DEVELOPMENT	1980	1990	1992	1995	2000
25. Percentage of children entering kindergarten meeting specific development standards for their age.					
A. Cognitive Development					
B. Language & Literacy Development					
C. Physical well-being					
D. Social/Emotional Development					

Early identification of developmental disabilities is beneficial to both children and their families and schools. Efforts should be made to develop measurements and standards for assessments throughout K-12. Assessments should be done in years coinciding with student skill proficiency assessments: Grades 3, 5, 8, and 11.

STABLE HOMELIFE	1980	1990	1992	1995	2000
26. Pregnancy rate per 1,000 females ages 10-17.					
A. African-American					
B. American Indians					
C. Asian-Americans					
D. Hispanic					
E. White					

Pregnancies among teens through 17 years of age result in poor outcomes for both mother and baby much more often than do pregnancies generally. Consequences may include prenatal and birth complications, difficulty with neonatal care, and infant mortality.

HEALTHY BABIES & TODDLERS	1980	1990	1992	1995	2000
27. Percentage of healthy birthweight babies.					

Low birthweight is the most important determinant in infant mortality. Low birthweight babies who survive bear an increased risk of birth defects, mental retardation, other physical disabilities, and child abuse and neglect.

HEALTHY BABIES & TODDLERS	1980	1990	1992	1995	2000
28. Percentage of infants whose mothers did not use:					
A. Illicit drugs during pregnancy					
B. Alcohol during Pregnancy (self-reported by mother)					
C. Tobacco during pregnancy (self-reported by mother)					

A. Illicit drugs during pregnancy

Drug exposure puts babies at a greater risk of complications during pregnancy and correlates with low birthweights and exposure to AIDS and sexually transmitted diseases. Babies in drug abusing families face greater risks of health, inadequate nutrition, and abuse and neglect.

B. Alcohol during pregnancy

In the extreme, significant use of alcohol is associated with fetal alcohol syndrome, which includes a wide variety of abnormalities. As little as two drinks per day during pregnancy may be associated with recognizable, though milder, abnormalities in a significant share of exposed infants.

C. Tobacco during pregnancy

Tobacco use is associated with low birthweight infants and the complications arising from low birthweight. As with alcohol, there is no known lower threshold of safe tobacco use during pregnancy.

HEALTHY BABIES & TODDLERS		1980	1990	1992	1995	2000
29.	Percentage of two year olds who are adequately immunized.					

Immunization is an effective way to reduce health risks among young children. It is also an indicator of the care and attention parents pay their children.

STABLE HOMELIFE		1980	1990	1992	1995	2000
30.	Percentage of children 0-17 living above 100% of the poverty level.					
	A. 0-4 yrs. old					
	B. 5-17 yrs. old					
	C. African-Americans (0-17)					
	D. American Indians (0-17)					
	E. Asian-Americans (0-17)					
	F. Hispanics (0-17)					
	G. Whites (0-17)					

This benchmark measures family well-being. Economic depravity often leads to feelings of hopelessness and desperation. These negative feelings can pave the way for destructive behavior that can lead to violence.

STABLE HOMELIFE		1980	1990	1992	1995	2000
31.	Percentage of children who were homeless at some time in the last year.					

Homeless children face greater risks in virtually every aspect of their lives, ranging from family stress and instability to lack of access to health resources.

ACCESS TO CHILDCARE		1980	1990	1992	1995	2000
32.	Percentage of child care facilities which meet established basic standards.					

Many of the community's families rely on non-familial supplemental care for their children. Currently, many child care providers are exempt from state standards. As a result, care which is unsafe may be legal and parents must rely on their own resources to determine whether or not a child care setting is safe for their child.

ACCESS TO CHILDCARE		1980	1990	1992	1995	2000
33.	Number of identified child care slots available for every 100 children under age 13.					

This benchmark estimates the supply of child care. It is based on national experience that 25 child care slots per 100 children under 13 is sufficient to meet the demand for that care.

STUDENT HEALTH PRACTICES		1980	1990	1992	1995	2000
34.	Percentage of students free of involvement with alcohol in the previous month.					
	A. Eight Grade					
	B. Eleventh Grade					

Use of alcohol, illicit drugs, and tobacco are linked with many poor outcomes, including increased incidence of drug dependence, increased property crime, and a variety of health risks.

STUDENT HEALTH PRACTICES		1980	1990	1992	1995	2000
35.	Percentage of students free of involvement with illicit drugs in the previous month.					
	A. Eight Grade					
	B. Eleventh Grade					

Refer to Benchmark #10 comments.

STUDENT HEALTH PRACTICES	1980	1990	1992	1995	2000
36. Percentage of students free of involvement with tobacco in the previous month.					
A. Eight Grade					
B. Eleventh Grade					

Refer to Benchmark #10 comments.

Success in School

ACADEMIC ACHIEVEMENT	1980	1990	1992	1995	2000
37. Percentage of students who achieve established skill levels.					
A. OVERALL					
1. African-Americans					
2. American Indians					
3. Asian-Americans					
4. Hispanics					
5. Whites					
B. THIRD GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organization					
5. Writing-conventions					
C. FIFTH GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organizations					
5. Writing-conventions					
6. Composite reading & math					
7. Composite writing skills					

D. EIGHTH GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organizations					
5. Writing-conventions					
E. ELEVENTH GRADE					
1. Reading					
2. Math					
3. Writing-ideas					
4. Writing-organization					
5. Writing-conventions					
6. Composite reading & math					
7. Composite writing skills					

These measures focus on the results of the education process: the knowledge and capabilities of students themselves at different grade levels.

Certificate of Advanced Mastery (CAM) competencies are currently being developed. When established, these should serve as the standards of success for completing secondary education to complement the Certificate of Initial Mastery competencies.

ACADEMIC ACHIEVEMENT	1980	1990	1992	1995	2000
38. High school graduation rate.					

Students who drop out of high school find it harder to succeed in the work place than those who graduate. In not finding work, they often spend their time ways that are counter-productive to their own development as well as that of the community's.

Educated Citizens

ADULT FORMAL EDUCATION	1980	1990	1992	1995	2000
39. Percentage of adults who have completed at least one year of educational programs after secondary school.					
A. African-Americans					
B. American-Indians					
C. Asian-Americans					
D. Hispanics					
D. Whites					

This and the following benchmarks measure the educational attainment of Oregon's workforce. As we shift to an information-driven, global economy, citizens will need information-processing and problem-solving skills rather than production skills. Education helps develop these needed skills.

ADULT FORMAL EDUCATION	1980	1990	1992	1995	2000
40. Percentage of adults who completed a certified apprenticeship program.					

Refer to Benchmark #15 comments.

ADULT FORMAL EDUCATION	1980	1990	1992	1995	2000
41. Percentage of adults who have completed:					
A. An associate degree in professional-technical education					
1. Overall					
2. African-Americans					
3. American Indians					
4. Asian-Americans					
5. Hispanics					
6. Whites					

B. A baccalaureate degree					
1. Overall					
2. African-Americans					
3. American-Indians					
4. Asian-Americans					
5. Hispanics					
6. Whites					
C. A post-baccalaureate degree					
1. Overall					
2. African-Americans					
3. American Indians					
4. Asian-Americans					
5. Hispanics					
6. Whites					

Refer to Benchmark #15 comments.

WORK FORCE SKILLS	1980	1990	1992	1995	2000
42. Percentage of people leaving post-secondary course work that possess skill sets to match work force needs.					

This benchmark measures the performance of our educational institutions in teaching citizens the skills necessary to be productive in the workplace. Indirectly, it is also an indicator of how willing and able citizens are to learn.

LITERACY SKILLS	1980	1990	1992	1995	2000
43. Percentage of adults who possess English literacy skills.					
A. Prose literacy (understands text information)					
1. Basic					
2. Intermediate					
3. Advanced					
B. Document literacy (can understand & use graphs, text, maps, etc.)					
1. Basic					
2. Intermediate					
3. Advanced					
C. Quantitative Literacy (can understand math & apply it)					
1. Basic					
2. Intermediate					
3. Advanced					
D. Information/technology literacy					

Workers need a broad variety of attributes that contribute to work success. Examples include a positive attitude toward work, the ability to learn, listening skills, and the ability to work with others. Citizens who are literate are better able to meet these skill requirements.

Health & Health Care

HEALTH CARE ACCESS		1980	1990	1992	1995	2000
44.	Percentage of citizens who have economic access to basic health care.					
	A. African-Americans					
	B. American Indians					
	C. Asian-Americans					
	D. Hispanics					
	E. Whites					

A lack of economic access to health care threatens both health and self-sufficiency, and imposes greater future costs on all community members. Those who do not seek health care when they first need it risk developing much more serious problems or health emergencies through delay.

HEALTH CARE ACCESS		1980	1990	1992	1995	2000
45.	Percentage of citizens who have geographic access to basic health care.					
	A. African-Americans					
	B. American Indians					
	C. Asian-Americans					
	D. Hispanics					
	E. Whites					

This benchmark measures the adequacy of the community's medical facilities to serve the populations medical needs in all areas of the community.

COMMUNICABLE DISEASES		1980	1990	1992	1995	2000
46.	Annual percentage and number of people with early diagnosis of HIV.					

This benchmark is an indicator of our control of the HIV epidemic. If we persuade those at risk to be tested before they notice symptoms, we can reduce both the number of people exposed to the virus and the greater health costs associated with later diagnosed HIV cases.

Equal Opportunity Communities

CITIZENS WITH MENTAL ILLNESS		1980	1990	1992	1995	2000
47.	Percentage of citizens with mental illness living in housing of their choice with adequate support.					

Providers of mental health services are moving toward a customer based provision of services. This benchmark intends to measure the extent to which persons with mental illness choose their own living arrangements and have enough support to maintain their lifestyle.

CITIZENS WITH MENTAL ILLNESS		1980	1990	1992	1995	2000
48.	Percentage of citizens with mental illness who are employed.					

Employment is one step toward independence. Even if a person is able to work for only a short amount of time each week, it can be just as rewarding.

CITIZENS WITH MENTAL ILLNESS		1980	1990	1992	1995	2000
49.	Percentage of citizens with mental illness living above the poverty level.					

This benchmark is another measure of how well and receptive our community is at aiding the mentally ill in their fight for economic independence.

CITIZENS WITH DEVELOPMENTAL DISABILITIES		1980	1990	1992	1995	2000
50.	Percentage of citizens with developmental disabilities living in housing of their choice with adequate support.					

Providers of developmental disability services are moving toward a customer based provision of services. This benchmark intends to measure the extent to which persons with developmental disabilities choose their own living arrangements and have enough support to maintain their lifestyle.

CITIZENS WITH DEVELOPMENTAL DISABILITIES		1980	1990	1992	1995	2000
51.	Percentage of citizens with developmental disabilities who are employed.					

Employment is one step toward independence. Even if a person is able to work for only a short amount of time each week, it can be just as rewarding.

CITIZENS WITH DEVELOPMENTAL DISABILITIES		1980	1990	1992	1995	2000
52.	Percentage of citizens with developmental disabilities living above the poverty level.					

This benchmark is another measure of how supportive our community is in aiding the developmentally disabled in their fight for economic independence.

CITIZENS WITH PHYSICAL DISABILITIES	1980	1990	1992	1995	2000
53. Percentage of citizens with physical disabilities living in housing of their choice with adequate support.					

Providers of physical disability services are moving toward a customer based provision of services. This benchmark intends to measure the extent to which persons with mental illness choose their own living arrangements and have enough support to maintain their lifestyle.

CITIZENS WITH PHYSICAL DISABILITIES	1980	1990	1992	1995	2000
54. Percentage of citizens with physical disabilities who are employed.					

Employment is one step toward independence. Even if a person is able to work for only a short amount of time each week, it can be just as rewarding.

CITIZENS WITH PHYSICAL DISABILITIES	1980	1990	1992	1995	2000
55. Percentage of citizens with physical disabilities living above the poverty level.					

This benchmark is another measure of how supportive our community is in aiding the physically disabled in their fight for economic independence.

SENIOR CITIZENS	1980	1990	1992	1995	2000
56. Percentage of elderly living in the least restrictive setting, either in their own home or in an alternative home setting.					

The ability to live independently is a fundamental issue of dignity and choice to seniors of the community. This benchmarks measures how well we aid and support them in achieving this goal.

Environment/Quality of Life

VALUES

We value cities and communities made up of healthy, vigorous neighborhoods where residents participate in community life and feel a sense of belonging and involvement.

We value the beauty and accessibility of our natural surroundings. We embrace a commitment to preserve and enhance the quality of our air, water, land, wildlife, and wildlife habitat.

We value an urban environment enhanced by parks, natural areas, and recreational opportunities that are accessible to all citizens.

We value the social, economic, and reactive contributions made to our quality of life by diverse and accessible public arts, cultural activities, and community events.

We value the community's physical development and renewal while recognizing that future growth should maintain a commitment to human scale, our architectural heritage, resource conservation, the environment, and neighborhoods.

TRENDS

- ◆ There is an increasing commitment and willingness to preserve and restore environmental quality.
- ◆ The community is increasingly aware of the benefit of protecting the quality of life.
- ◆ The region's population will grow by some 500,000 residents before the year 2010.
- ◆ Less federal and state funding will be available to local jurisdictions to meet growth needs.

GOALS

- ◆ **Preserve and expand the community's system of parks, open spaces, and natural areas.**

Excellent parks and outdoor recreation facilities are community hallmarks. Parks provide access to the outdoors, facilities for recreation, open space for visual and environmental cushioning of urban development, and habitat for wildlife within the urban area.

- ◆ **Provide an adequate variety and supply of safe, decent, affordable housing.**

The condition, diversity, and affordability of housing are important indices of the community's quality of life. Housing is characterized by rising prices, low vacancy rates in rental housing and aging housing stock in need of restoration or replacement. These trends threaten to place decent, affordable housing beyond the reach of too many low-income individuals and families. Quality housing must be available to all people of all income levels in the community.

- ◆ **Ensure that each neighborhood is healthy and vigorous.**

The well-being of the community starts with the conditions of its neighborhoods. Community leaders should support healthy neighborhoods by promoting safe and decent housing, economic activity that provides well paying jobs, crime prevention and control and community policing, quality schools and children's services, successful small businesses in neighborhood commercial zones, accessible social services for all ages, transportation alternatives to the automobile, recreation opportunities through parks, park programs and open space, diversity of the resident population, and strong neighborhood-based organizations.

- ◆ **Enhance the community's quality of life through diverse arts and through cultural and community events that are accessible to all residents.**

A flourishing cultural life enriches a community by nurturing creative talent, providing alternative activities for youth, promoting neighborhood involvement and pride, and providing creative forums to address societal issues. Cultural vitality also creates jobs, promotes private investment in public amenities, enhances the city's image, helps attract businesses, promotes the hospitality industry, and contributes to business district and neighborhood stability.

- ◆ **Implement alternatives to the automobile in the region.**

The Portland metropolitan region can be a national leader in taming the automobile. The area's quality of life, environment and neighborhood livability are at stake. Policy makers and planners must continue their efforts to make the metropolitan region a pedestrian-friendly place to live and work and to contain traffic, pollution and congestion.

- ◆ **Encourage the conservation of resources and energy.**

Regional population growth will place high demand on the area's natural resources. There are limits to the capacity of our air, water, land and energy resources to support growth and absorb waste. These resources can be protected if the cost of environmental degradation are integrated into the economy, if regulatory controls are strengthened, and the public is educated about its role in preventing or causing environmental degradation.

- ◆ **Retain and continue to develop the unique character of Portland as a major metropolitan area.**

Portland is recognized as one of the most livable cities in the United States. This livability stems from conscious efforts to shape our urban environment through such means as planning, light rail, and various civic development projects. A pedestrian-oriented downtown, quality urban design, public art, and a rich variety of amenities, services and activities contributes to Portland's unique character and attractiveness. Major efforts are needed to enhance these qualities and to maintain Portland's role as the urban center of the region.

- ◆ **Manage regional growth to provide effective public services at the lowest responsible cost, to improve environmental quality, and to enhance the quality of life.**

If uncontrolled growth occurs in the metropolitan region, Portland will feel its adverse impact as much as the suburban communities where such growth is likely to occur. Portland and Multnomah County must work cooperatively with other regional governments to adopt regional strategies that prevent urban sprawl development, reduce unnecessary demands on public infrastructure and services, and protects the region's environment.

BENCHMARKS

Livable Communities

COMMUNITY DESIGN		1980	1990	1992	1995	2000
57.	Acres of parks and protected green space per 1,000 citizens.					

This benchmark measures the extent to which the community provides and protects its public and private parks and greenspace despite population growth and development. The definition of "greenspaces" should include "environmental zones" and other natural areas protected from not publicly owned development.

HOUSING		1980	1990	1992	1995	2000
58.	Percentage of home owners and renters below median income spending less than 30% of their household income on housing (including utilities: gas, electric, water, garbage, sewer, phone).					

This benchmark measures the overall affordability of Portland's housing for residents below median income.

HOUSING		1980	1990	1992	1995	2000
59.	Number of citizens who were homeless at some time in the last year.					

This is an indicator of the basic welfare of Oregonians.

COMMUNITY DESIGN	1980	1990	1992	1995	2000
60. Percentage of population that lives within one half mile walk of all of the following:					
A. Park/Open Space					
B. Transit Service					
C. Elementary School					
D. Neighborhood Commercial Node					
E. Bike Path					

This benchmark measures the extent to which the community's population lives in neighborhoods with a full range of accessible basic services. It is an attempt to measure the community's success at creating an "urban village" environment that reduces dependence on automobile travel while it increases the sense of community within our neighborhoods.

SENSE OF COMMUNITY	1980	1990	1992	1995	2000
61. Percentage of people who feel a sense of community in their neighborhood.					

The community values our quality of life. A true indicator of our special livability is people feeling a sense of belonging, knowing their neighbors, and identifying with their neighborhood.

TRANSPORTATION	1980	1990	1992	1995	2000
62. Percentage of people who commute (one-way) within 30 minutes between where they live and work.					

This benchmark measures the extent to which the distribution of housing & jobs combine with the transportation system, enables residents to efficiently get to and from work, whether by car, transit, bicycle, walking, working at home or by other means.

TRANSPORTATION	1980	1990	1992	1995	2000
63. Percentage of people who commute to and from work and use multiple modes of transportation for commuting.					

Refer to benchmark #6 comments.

Clean, Beautiful Environment

CLEAN ENVIRONMENT	1980	1990	1992	1995	2000
64. Percentage of streets rated acceptably clean.					

This benchmark measures the physical appearance of a neighborhood which reflects the feelings of the people living within the neighborhood in a tangible way.

CLEAN ENVIRONMENT	1980	1990	1992	1995	2000
65. Percentage of surfaces where there is little or no graffiti.					

Refer to benchmark #8 comments.

AIR QUALITY	1980	1990	1992	1995	2000
66. Number of days per year the community meets government ambient air quality standards.					

This benchmark measures air quality in Portland, Multnomah County, & the region, recognizing that the city is in a regional airshed. The data should be based on monitoring of the airshed for carbon monoxide, ozone, fine particulates, and other pollutants.

AIR QUALITY	1980	1990	1992	1995	2000
67. Carbon dioxide emissions as a percentage of 1990 emissions.					

This benchmark measures increasing emissions of greenhouse gases will effect the earth's temperature before the end of the next century. Many of the actions that will have to be taken to reduce greenhouse gas emissions are the responsibility of individuals businesses, local government and state. Most of the reductions to meet the target can be achieved by cost-effective energy efficient measures.

WATER QUALITY	1980	1990	1992	1995	2000
68. Percentage of samples per year the community's rivers and streams meet government in-stream water quality standards.					

This benchmark measures in-stream water quality within Portland, Multnomah County, & the region, recognizing that such water systems are regional in nature. The data should establish a maximum daily load per Oregon Department of Environmental Quality standards.

Growth, Resources, and Conservation

WATER CONSERVATION	1980	1990	1992	1995	2000
69. Annual water usage per capita.					
A. Industrial					
B. Residential					
C. Commercial					

This benchmark measures the community's progress towards water conservation.

ENERGY CONSERVATION		1980	1990	1992	1995	2000
70.	Number of energy units used per capita.					
A.	Industrial					
B.	Residential					
C.	Commercial					

This benchmark measures the community's progress towards achieving energy efficiency, which reduces pollution.

SOLID WASTE		1980	1990	1992	1995	2000
71.	Pounds of solid waste landfilled per capita per year.					

This benchmark measures recycling and reuse to save resources, landfill space, & reduces air & water pollution.

"Portland As The Central City"

POPULATION GROWTH		1980	1990	1992	1995	2000
72.	Percentage of Portland metropolitan area population growth since 1990 occurring within the City of Portland.					
A.	Seniors					
B.	Youth					
C.	Special Needs					
D.	By Income Level					

This benchmark measures the extent to which Portland maintains its share of regional population in the coming decades of growth. This is critical for achieving many aspects of quality of life in the City and the region.

Central City Economy		1980	1990	1992	1995	2000
73.	Percentage of total non-manufacturing jobs in the Portland metropolitan area located in downtown Portland.					

This benchmark provides a measure of the on-going vitality of Portland's downtown as the region's primary economic, cultural and institutional urban center. Downtown Portland is the geographic area described in the current "Central City Plan".

Civic Support

CIVIC PARTICIPATION		1980	1990	1992	1995	2000
74.	Percentage of eligible citizens who vote.					

This benchmark measures voting as an indicator of public participation in the government process and overall civic involvement.

FUNDING FOR THE ARTS		1980	1990	1992	1995	2000
75.	Annual per capita public and private financial support for the arts in the region including:					
A.	Libraries					
B.	Museums					
C.	Visual Arts					
D.	Performing Arts					

This benchmark provides a measure of the vitality of the arts and artistic and cultural institutions in Portland. The recipients of the financial support will be located in Portland; the sources of the support will be both within and outside Portland.

Governance

VALUES

We value open, honest government that is responsive to citizens.

We value strong, creative leadership by elected officials and private citizens willing to empower and work with the entire community to shape the community's future.

We value cooperative approaches to problems that extend beyond community boundaries.

TRENDS

- ◆ Public and private sector problems and policy issues affecting them have become increasingly regional in nature and require regional solutions.
- ◆ At a time when there is increased demand for public services, paying for those services has been made difficult by new limitations imposed on local revenue sources and by reduced federal support to state and local jurisdictions.
- ◆ State and federal policy makers will continue to impose costly requirements on local governments without corresponding financial assistance to defray those costs.
- ◆ Non-property tax revenue sources -- user and franchise fees and business income fees -- are rapidly approaching their limits, and citizens are already seeking ways to limit their tax burden.

GOALS

- ◆ **To create stronger, more innovative, more responsive citizen and elected leadership.**

Effective leadership at both grass roots and institutional levels is vital to healthy communities. Leadership talent should be consciously nurtured in community organizations as well as city and regional governments. To do this, civic and political organizations must provide leadership opportunities and training. This training should be an ongoing process.

- ◆ **Restructure government within the region to more effectively address regional and local needs.**

Many of the issues raised by rapid regional growth cross boundaries of long-established governments and service districts. In addition, the needs of the metropolitan areas are different from those in the surrounding rural areas, even if both city and county fall within the same government jurisdiction. As it grows into a continuous metropolitan area, the region needs a government that is equipped to deal with needs on a region-wide basis.

- ◆ **Restructure local government to provide needed services at lower cost.**

Decreasing resources and increased demand for services mandate government to become more efficient and cost-effective in delivering services. Innovative techniques and technology need to be pursued to meet future needs.

BENCHMARKS

Civic Support

CITIZEN SATISFACTION WITH GOVERNMENT	1980	1990	1992	1995	2000
76. Percentage of citizens who are satisfied that services are necessary, responsive and cost-effective.					

This benchmark measures how the public perceives government's delivery of services. Citizen attitudes are one good measure of overall satisfaction with how the City of Portland and Multnomah County, Metro, and other governmental entities are doing.

CIVIC PARTICIPATION	1980	1990	1992	1995	2000
77. Percentage of citizen volunteers in a governmental advisory capacity who are satisfied that their recommendations were carefully and respectfully considered.					

This benchmark measures how satisfied community members are with civic participation activities in which they have taken part. This is an important benchmark if government is to become truly community-driven, because they must make those who voluntarily act in an advisory capacity feel like their input is important and their efforts valued.

CIVIC PARTICIPATION	1980	1990	1992	1995	2000
78. Percentage of citizens who volunteer at least 50 hours of their time per year to civic, community, or non-profit activities.					

This benchmark is intended to measure the extent to which citizens seek to improve the quality of life of their neighborhood and community by actively participating in civic, community and non-profit activities.

Healthy Government and Community Organizations

EFFICIENT AND EFFECTIVE GOVERNMENT	1980	1990	1992	1995	2000
79. Percentage of government organizations that adopt benchmarks, incorporate them into budget and/or planning processes, and collect supporting data.					

Most agencies historically have measured themselves based on inputs (dollars spent, employees/unit of production, etc.) rather than on the outcomes. Measurable outcomes are a key to improving the performance of government. Although this benchmark is a measure of efforts, it appears directly pertinent to the goals of the Portland-Multnomah County Progress Board.

EFFICIENT AND EFFECTIVE GOVERNMENT	1980	1990	1992	1995	2000
80. Percentage of community organizations that adopt benchmarks, incorporate them into budget and/or planning processes, and collect supporting data.					

This benchmark relates to #4. These benchmarks also indicate the public and private sector's understanding of the importance of this planning and its affect on the community. Although this benchmark is a measure of efforts, it appears directly pertinent to the goals of the Portland-Multnomah County Progress Board.

PUBLIC FINANCE	1980	1990	1992	1995	2000
81. General obligation bond rating (Standard & Poor's).					

This is one indication of how independent experts perceive the financial soundness of the community.

PUBLIC FINANCE	1980	1990	1992	1995	2000
82. Per capita cost of government.					

This benchmark measures the cost-effectiveness of government.

PUBLIC FINANCE	1980	1990	1992	1995	2000
83. Direct government service delivery expenses as a percentage of total government expenditures.					

This benchmark measures the administrative costs in relation to the direct service delivery costs of government programs.

Public Safety

VALUES

We value the right of all the community's citizens to be safe and secure in their persons and property.

We value an open and friendly community that is free from bigotry and intimidation.

We value a community that welcomes and respects the individuality, unique talents, and contributions of all people regardless of age, gender, ethnicity, sexual orientation, religion, physical or mental ability, or financial means.

We value a community that has prepared itself for an environmental disaster.

TRENDS

- ◆ Violent crimes, hate crimes, and crimes related to drugs and gangs make up an increasing share of the criminal activity in the community.
- ◆ Crimes committed by youth will continue to be a problem with smaller numbers of young people committing more serious offenses.
- ◆ The community will continue to take an increasingly proactive role in addressing crime and will continue to participate in formulating innovative public safety policy and implementing the solutions.
- ◆ Calls from fire and medical emergency services will continue to rise.
- ◆ Public policy direction from national, state, and local levels have broadened local responsibilities for provision of emergency services.

GOALS

- ◆ **Reduce crime, especially violent crime, as well as the fear of crime, and increase city and community partnerships beginning in high-crime areas.**

The well-being of families is the foundation of a safe community and a safe community is essential for successful families. The root causes of crime lie in the conditions of poverty, domestic violence, child abuse, substance abuse, lack of access to prevention and treatment, low job skills, lack of coordination among existing programs, and poor allocation of resources. These conditions combine to create hopelessness and desperation in individuals caught up in the cycle of crime, violence, dependency, and victimization. It is to be stressed that family responsibility lay with both the female and male as they act within and outside of the family unit. By focusing on these root causes of crime and where responsibilities lay, we will be more likely to progress towards the goal of preventing crime. Employment; stable housing; a strong, supportive family unit; education; and children free from drug and alcohol abuse are major factors that can help to prevent crime.

- ◆ **To develop and continue regional partnerships to increase emergency preparedness county-wide.**

While emergency, medical, and disaster assistance is tested less often than police services, the community must be prepared to withstand such catastrophes as an earthquake and must be educated in the prevention of fire, medical, and other emergencies. With dwindling resources, regional communities must work together ensure that emergency systems are in place to adequately respond to the changing populations, government regulations, and the expectation that all areas of the community have access to the resources of emergency personnel.

BENCHMARKS

Liveable Communities

SENSE OF COMMUNITY		1980	1990	1992	1995	2000
84.	Percentage of citizens who feel safe and secure.					

This benchmark is a measure of the livability of neighborhoods. The public's perception of safety within a neighborhood is critical to their willingness to perform "neighborhood watch" functions and to thereby assist in preventing/controlling criminal activities.

Safe Communities

CRIMES OF PREJUDICE		1980	1990	1992	1995	2000
85.	Number of reported crimes against people or property motivated by prejudice including race, sexual orientation, religion and national origin.					

This benchmark provides a measure of the social livability of the communities by means of the tolerance levels of the people living within them. It also provides a measure of the community's comfort level in reporting such crimes to local authorities and community organizations and knowing that they will be handled in a respectful and confidential manner.

DOMESTIC VIOLENCE		1980	1990	1992	1995	2000
86.	Number of reported incidents of domestic violence including.					
A.	Children abused and neglected per 1,000 people under 18					
B.	Spouses or domestic associates abused per 1,000 people					
C.	Elderly abuse per 1,000 people					
D.	Families repeatedly victimized by such incidents.					

This benchmark provides a measure of the emotional health of Portlanders as individuals and families. The stability of the family unit is a crucial building block toward decreasing the potential for criminal behavior.

REPORTED CRIMINAL ACTIVITY		1980	1990	1992	1995	2000
87.	Number of reported crimes against people per 1,000 population. (These crimes include: murder, rape, robbery, kidnapping, assault.)					
A.	Arrests of people under 18 years of age					
B.	Arrests of people over 18 years of age.					

This benchmark is the fundamental measure of public safety for the community. It specifically addresses the dramatic increase in violent crimes committed by youth under eighteen. The community, in targeting its resources to support the child and family, will hopefully address the root causes of violent crime and treat the affected youth earlier in the continuum of public safety sanctions and thus increase the opportunity for rehabilitation.

REPORTED CRIMINAL ACTIVITY	1980	1990	1992	1995	2000
88. Number of reported crimes against property per 1,000 population. (These crimes include: burglary, larceny, motor vehicle theft, arson, and vandalism.)					
A. Arrests of people under 18 years of age					
B. Arrests of people over 18 years of age.					

This complements the "crimes against people" benchmark. It, too, is a fundamental measure of public safety, but it reaches farther in that more people are touched by property crimes than other types of crimes because they occur in our neighborhoods more often.

DRUG USE	1980	1990	1992	1995	2000
89. Percentage of arrestees testing positive for alcohol or illicit drugs in Multnomah County.					

Many of the crimes committed in our communities are drug or alcohol related. This benchmark measures the effects of drug and alcohol on the public safety of the community and the efforts aimed at reducing the cycle of addiction.

FIREARMS	1980	1990	1992	1995	2000
90. Firearm injuries and fatalities rate per 1,000 population.					
A. Under 18					
B. 18 and over					

Mounting social problems, the inability of citizens to resolve conflicts peacefully, and the increased availability of guns has led to an increase in firearm injuries. This benchmark, like the reported crime benchmarks, address the increase of violence by juveniles.

CRIMINAL ACTIVITY		1980	1990	1992	1995	2000
91.	Victimization rates per 100,000 population. (These crimes include: hate crimes, domestic violence, rape, & juvenile coerced theft).					
A.	African-Americans					
B.	American Indians					
C.	Asian-Americans					
D.	Hispanics					
E.	Whites					

This benchmark provides a more accurate picture of the criminal activity within the community's neighborhoods. It is a measure of the social livability of the community by means of the tolerance levels of the people living within them. It also provides a measure of the community's comfort level in reporting such crimes to local authorities and community organizations and knowing that they will be handled in a respectful and confidential manner.

DRUG USE		1980	1990	1992	1995	2000
92.	Percentage of adults who use illegal drugs.					

This benchmark is a measure of the unhealthy and illegal drug practices of our community's adult population. Illegal drug use often leads to violent, irrational, and criminal behavior and children of drug abusing families may follow in the path of their parents.

JUSTICE		1980	1990	1992	1995	2000
93.	Percentage of felons who commit new felonies within three years of reentry to the community.					

This is a critical measure of public safety and, more importantly, of the community's ability to help felons succeed in the community as productive citizens.

JUSTICE	1980	1990	1992	1995	2000
94. Percentage of diverted offenders who commit the same type of offense within one year after completing the diversion program.					
A. Substance abuse					
B. Alcohol					
C. Domestic violence					

Alcohol and substance abuse and the tendency to commit crimes of domestic violence is prevalent among those whose parole is revoked. This benchmark addresses our ability to help those who commit crimes address these root behavioral problems.

Emergency Preparedness

COMMUNITY PREPAREDNESS	1980	1990	1992	1995	2000
95. Percentage of residences, institutions, and businesses which are prepared for an emergency by being able to sustain themselves for 72 hours.					

This benchmark measures the extent to which the emergency service providers have communicated with and educated the public about emergency preparedness.

EMERGENCY LOSSES	1980	1990	1992	1995	2000
96. Property and person loss, due to emergency/disasters.					
A. Number of lives lost per 1,000					
B. Dollar value of loss as percentage of structure/property exposed.					

This is an indicator of the effectiveness of fire programs, efficiency of fire protection, and overall awareness of fire.

EMERGENCY SERVICES PREPAREDNESS	1980	1990	1992	1995	2000
97. Percentage of emergency service agencies (defined in ORS 401) with emergency plans and emergency response procedures in place that are regularly exercised and updated per federal standards.					

This benchmark measures the extent to which all community members live within jurisdictions that have an emergency management program in place with the capability to respond to a disaster, coordinate multi-jurisdictional resources, and assist communities to fully recover from the effects.

ACKNOWLEDGEMENTS

This report is the product of over 100 citizens from the private and public sector who under the leadership of City of Portland Mayor Katz and Multnomah County Chair Beverly Stein participated in the benchmark process.

The Portland-Multnomah County Progress Board contributed many hours in selection of these measurements. The five task forces drafted the initial benchmarks and made their recommendations to the Progress Board. Hundreds of citizens volunteered their input on the urgent benchmarks during a series of public meetings.

Duncan Wyse, of the Oregon Progress Board, provided technical assistance to the process and worked with Bill Wyatt, of the Oregon Business Council, in assisting with facilitation of the public meetings.

Debbie McCabe, Project Manager; Anne Friedlander, Mary DiOrio, and Jon Jenks-Bauer, Project Assistants provided staff support for the benchmarking process.

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Debbie McCabe, Project Manager
Mary DiOrio, Assistant
Anne Friedlander, Assistant
Jon Jenks-Bauer, Assistant

MEETING DATE: FEB 17 1994

AGENDA NO: R-42

(Above Space for Board Clerk's Use ONLY)

AGENDA PLACEMENT FORM

SUBJECT: RESOLUTION

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: 2/17/94

Amount of Time Needed: 5 Mintues

DEPARTMENT: Nondepartmental DIVISION: County Chair's Office

CONTACT: Meganne Steele TELEPHONE #: 248-3308

BLDG/ROOM #: 106/1410

PERSON(S) MAKING PRESENTATION: Chair Stein, Meganne Steele

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

RESOLUTION in the matter of Recommending Adoption of Benchmarks for Multnomah County Government.

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1994 FEB 10 PM 12:02

SIGNATURES REQUIRED:

ELECTED OFFICIAL: Beverly Stein

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

0516C/63 *Copy of Resolution 94-28 Sent to Meganne Steele on 2-17-94.*

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

Recommending Adoption of)
Benchmarks for Multnomah) RESOLUTION 94 - 28
County Government

WHEREAS, benchmarks are quantified targets for specific, quality of life conditions which our community is striving to realize in the future; and

WHEREAS, benchmarks are a powerful tool communities can use to focus efforts for long-term results and to create partnerships to solve problems; and

WHEREAS, benchmarks can guide Multnomah County's policy-making, budgeting, program planning, performance measurement and evaluation efforts; and

WHEREAS, the Board of County Commissioners, Elected Department Heads and managers met in five work sessions over a four month period to develop consensus on a set of benchmarks for Multnomah County and to identify urgent County benchmarks; and

WHEREAS, the broad-based citizen planning process to develop the Multnomah County Visions documents in 1989 and 1992 clarified underlying values, concerns and visions for the community which served as a basis for selecting benchmarks; and

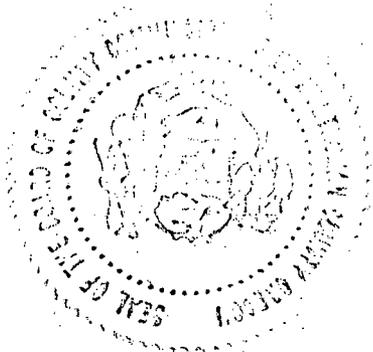
WHEREAS, the Board of County Commissioners received input from citizens during recent benchmarks-related citizen participation efforts coordinated by the Citizen Involvement Committee including citizen meetings, a community television show and surveys; and

WHEREAS, benchmarks development and refinement is a continuous cycle involving clarifying a common vision, defining desired results [benchmarks], agreeing on strategies to achieve results, defining program and budget priorities, establishing performance measures and reporting on progress towards those results;

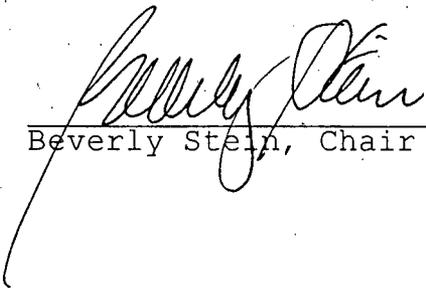
NOW, THEREFORE BE IT RESOLVED that the Board of County Commissioners hereby:

1. Adopts Benchmarks for Multnomah County as presented in Attachment A;
2. Adopts Urgent Benchmarks for Multnomah County as presented in Attachment B;

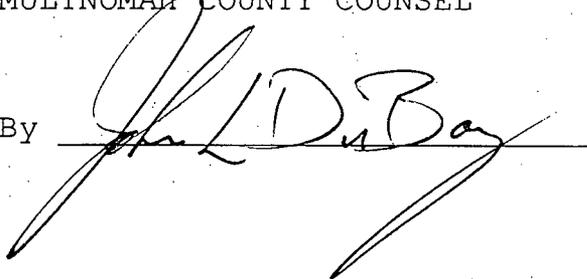
DATED THIS 17th day of February, 1994.



BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON


Beverly Stein, Chair

LAURENCE KRESSEL
MULTNOMAH COUNTY COUNSEL

By 

2/8/94	MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS									
Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

HIV and AIDS - annual percentage/ number of HIV cases with an early diagnosis.	✓	✓		✓	✓					
Sexually transmitted disease - rate for adults 20 to 44 years old.	✓	✓								
TB - incidence of tuberculosis per 1,000 population	✓	✓		✓						
Hepatitis - Incidence of hepatitis B per 1,000 population.	✓	✓		✓						
Care of elderly -Percentage of elderly living independently or with adequate support.		✓	✓							
Mental Health Care Access- Percentage of population with access to public or private treatment for mental or emotional problems [by children or adults]	✓	✓	✓	✓	✓	✓	✓			
Mental illness - Percentage living in housing of their choice with adequate	✓	✓	✓	✓						

2/8/94	MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS									
Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

2/8/94

MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS

Multnomah County Benchmarks	County Departments With Related Responsibilities								
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY

Homelessness - Number of citizens who were homeless at some time in the last year. [by children and adults]	✓	✓	✓	✓	✓		✓			
Housing - percentage of home owners and renters below median income spending less than 30 percent of their household income on housing and utilities.[by ethnicity]	✓		✓							
Tax Foreclosures - Number of tax foreclosures per 1,000 homes. [by owner occupied v. rental]	✓	✓	✓					✓		
Child Care Quality - percentage of child care facilities which meet established basic standards.	✓	✓								
Child Care Availability - no. of identified child care slots available for every 100 children under age 13.	✓									
Child Abuse - Number of children abused or neglected per 1,000 persons under 18. [by ethnicity]	✓	✓		✓	✓	✓	✓		✓	
Spousal abuse - domestic violence calls per 1,000 households.	✓	✓	✓	✓	✓	✓	✓		✓	
Elder abuse - rate per 1,000 in elderly population.	✓	✓	✓		✓	✓	✓		✓	

2/8/94

MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS

Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Student Alcohol Use - Percentage of students free of involvement with alcohol in the previous month. [at 8th & 11th grades]	✓	✓		✓	✓	✓	✓			
Student Drug Use - Percentage of students free of involvement with illicit drugs in the previous month. [at 8th & 11th grades]	✓	✓		✓	✓	✓	✓			
Adult Drug abuse -Percentage of adults who use illegal drugs.	✓	✓	✓		✓	✓	✓			
Drug Treatment - percentage of people seeking alcohol or drug treatment who receive it.	✓	✓	✓	✓	✓	✓	✓			
Hate crimes - per 1,000 population.	✓	✓	✓	✓	✓	✓	✓			
Sense of Safety - percentage of citizens who feel safe and secure from crime.	✓		✓	✓	✓	✓	✓			
Violent Crime - crimes against people per 1,000 population. [by juveniles and adults]	✓			✓	✓	✓	✓			
Property Crimes - crimes against property per 1,000 population. [by juveniles and adults]	✓			✓	✓	✓	✓			
Firearm Injuries - firearm injury rate per 1,000 population.	✓	✓	✓	✓	✓	✓	✓			

2/8/94

MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS

Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Weapons Permits - number of concealed weapons permits issued per 1,000 population [by male /female]				✓	✓	✓	✓			
Weapons Seized in Schools - number of weapons seized in public schools [by high school or below]	✓			✓	✓	✓	✓			
Diversion Programs - percentage of diverted offenders who commit any offense within one year after completing the diversion program. [by juveniles and adults]	✓	✓		✓	✓	✓	✓			
Recidivism - Percentage of felons who commit new felonies within three years of re-entry into the community. [by juveniles and adults]	✓			✓	✓	✓	✓			
Drugs & Crime -rate of arrestees who have one or more drugs in their system at time of arrest.	✓	✓		✓	✓	✓	✓			
Offender drug treatment - percentage of offenders needing drug and alcohol treatment who receive it.	✓	✓		✓	✓	✓	✓			
Community Policing - No. of communities involved in a community-based strategic plan for law enforcement.					✓	✓	✓			

2/8/94	MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS									
Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Victimization: victimization rates for hate crimes, rape , domestic violence and juvenile coerced theft [by ethnicity]	✓	✓	✓	✓	✓	✓	✓			
Community Preparedness - percentage of residences, institutions and businesses which are prepared for an emergency by being able to sustain themselves for 72 hours.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Emergency Losses - Property and person loss due to emergency/ disasters : number of lives lost per 1,000 ; dollar value of loss as a percentage of structure / property exposed.					✓					✓
Emergency Services Preparedness - Percentage of emergency service agencies (defined by ORS 401) with emergency plans and emergency response procedures in place that are regularly exercised and updated per federal standards.					✓					✓
Animal control - Reported incidents of personal injuries from dangerous dogs per 1,000 population.		✓			✓		✓	✓		
Family Wage Jobs - Average annual payroll per worker.	✓		✓						✓	✓

2/8/94	MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS									
Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	DCC	DA	DES	LIBRARY	OTHER

Poverty - percentages of citizens with incomes above 100% of the Federal poverty level.[by ethnicity]	✓		✓						✓	✓
Children in Poverty - percentage of children living above poverty. [by ethnicity]	✓	✓		✓					✓	✓
Child Support - Percentage of Court ordered child support paid to single parent families.	✓			✓		✓	✓		✓	
Family Wage Jobs - Average annual payroll per worker.	✓		✓						✓	✓
Income - percentages of citizens with incomes above 125% of the Federal poverty level.	✓		✓						✓	✓
High school completion - completed high school or an equivalent program [by ethnicity]	✓			✓					✓	
Workforce Readiness - percentage of people who leave post-secondary programs possessing skill sets to match work force needs.	✓			✓				✓	✓	
Early Childhood Development - Percentage of children entering kindergarten meeting specific developmental standards for their age.	✓	✓		✓					✓	

2/8/94

MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS

Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Readiness to Learn - Percent of children having contact with a public library before starting kindergarten.	✓	✓							✓	
Childrens' Library Use - Percentage of children who have library cards and have used them within the last six months. [by selected grades - 1st, 6th and 11th]	✓								✓	
Library Use - Books Borrowed per capita.	✓		✓	✓	✓	✓			✓	
Adult Literacy - Percentage of adults with english literacy skills [detailed by prose literacy, document literacy, and quantitative literacy]	✓	✓		✓	✓	✓			✓	
Water Quality - number of days per year our rivers and streams meet government in-stream water quality standards.								✓		
Recycling & Solid Waste - pounds of solid waste landfilled per capita per year.								✓		
Open Spaces - Acres of parks and protected green spaces per 1,000 population.								✓		✓

2/8/94	MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS									
Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Land Use Planning - Percent of rural lands that are included within a current, approved Rural Area Plan (R.A.P.)								✓		✓
Community Design - percentage of population that lives within one-half mile walk of all of the following: park/open space; transit service; elementary school; neighborhood commercial mode; bike path.								✓		✓
Proximity of Home to Work - Percentage of people who commute [one-way] within 30 minutes between where they live and work.								✓		✓
Transportation Alternatives - percentage of people who commute to and from work and use multiple modes of transportation for commuting.								✓		✓
Infrastructure Investment - Real per capita outlays for public infrastructure.								✓		✓
Clean Streets - percentage of streets rated acceptably clean.								✓		
Streamlined Permits/Licenses - Percent of permits/licenses issued within target time period or less		✓	✓		✓			✓		

2/8/94

MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS

Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Sense of Community in Neighborhoods - Percentage of people who feels a sense of community in their neighborhood	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Civic Participation - Percent of eligible citizens who vote.								✓		✓
Taxes - total taxes per \$1,000 income.										✓
Cost of Govt. - per capita cost of government.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Financial Capacity & Performance - Multnomah county's general obligation bond rating										✓
Citizen Satisfaction - Percentage of citizens who are satisfied that County services are necessary, responsive and cost-effective. [by type of service]	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Knowledge of Govt. - Percentage of citizens who understand the Oregon governmental system.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Citizen involvement - Percentage of citizens who volunteer at least 50 hours per year to civic, community or non-profit activities. [by age and ethnicity]	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

2/8/94	MATRIX OF BENCHMARKS BY COUNTY DEPARTMENTS									
Multnomah County Benchmarks	County Departments With Related Responsibilities									
	CHILDREN & FAMILIES	HEALTH	AGING	JUVENILE JUSTICE	MCSO	D C C	D A	D E S	LIBRARY	OTHER

Govt. Responsiveness - percent of citizen volunteers in a governmental advisory capacity who are satisfied that their recommendations were carefully and respectfully considered.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
County Workforce and Contractor Diversity - Percent of minorities and women presently employed by the County or its contracted service providers versus percent presently available within the local labor market.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Govt. Accountability - Percentage of agencies that employ results-oriented performance measures.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

MULTNOMAH COUNTY'S URGENT BENCHMARKS

Children & Families

- ◆ **Reduce Teen Pregnancy**
Pregnancy rate per 1,000 females ages 10 - 17[by ethnicity]
- ◆ **Increase Percentage of Drug - Free Babies**
Percentage of infants whose mothers did not use illicit drugs, alcohol or tobacco during pregnancy.
- ◆ **Reduce Domestic Abuse**
 - a. Child Abuse- Number of children abused or neglected per 1,000 persons under 18. [by ethnicity]
 - b. Spousal Abuse - Spouse or domestic abused per 1,000 persons [by ethnicity]
 - c. Elderly Abuse - Elder abuse per 1,000 persons [by ethnicity]
- ◆ **Reduce Student Alcohol & Drug Use**
 - a. Percentage of students free of involvement with alcohol in the previous month.
 - b. Percentage of students free of involvement with illicit drugs in the previous month.
[both of the above measured at 8th and 11th grades]

Public Safety

- ◆ **Reduce Violent Crime**
Crimes against people [by juveniles and adults]
- ◆ **Increase Success of Diversion Programs**
Percentage of diverted offenders who commit any offense within one year after completing the diversion program. [by juveniles and adults]
- ◆ **Reduce Recidivism**
Percentage of felons who commit new felonies within three years of re-entry into the community.
[by juveniles and adults]

Access to Services

- ◆ **Increase Drug Treatment Services**
Percentage of people seeking alcohol or drug treatment who receive it.
- ◆ **Increase Health Care Services**
Percentage of population with economic access to health care [by ethnicity]
- ◆ **Increase Mental Health Care Services**
Percentage of population with access to public or private treatment for mental or emotional problems
[by children and adults]

MULTNOMAH COUNTY'S URGENT BENCHMARKS [CONTINUED]

Good Government

- ◆ **Increase County Workforce and Contractor Diversity**
Percent of minorities and women presently employed by the County or its contracted service providers versus percent presently available within the local labor market.

- ◆ **Increase County Government Accountability & Responsiveness**
 - a. Citizen Satisfaction- Percentage of citizens who are satisfied that County services are necessary, responsive and cost-effective. [by type of service]
 - b. Government Responsiveness -percent of citizen volunteers in a governmental advisory capacity who are satisfied that their recommendations were carefully and respectfully considered.
 - c. Cost of Government - per capita cost of government.

MEETING DATE FEB 17 1994

AGENDA NUMBER R-5

AGENDA PLACEMENT FORM

SUBJECT: Resolution to Approve FY 1994-95 Budget for the Division of Assessment & Taxation.

BOARD BRIEFING: Date Requested: _____

Amount of Time Needed: _____

REGULAR MEETING: Date Requested: February 17, 1994

Amount of Time Needed: 20 minutes

DEPARTMENT: Environmental Services DIVISION Assessment & Taxation

CONTACT: Janice Druian TELEPHONE : 248-3345

BLDG/ROOM: 166/515

PERSON(S) MAKING PRESENTATION: Janice Druian and Betsy Williams

ACTION REQUESTED

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

House Bill 2338 requires counties to submit their approved Assessment & Taxation budget for review by the Oregon Department of Revenue no later than March 1, 1994, for the county to be able to share in the statewide "grant" revenue pool.

Prior approval of the A&T budget by Multnomah County Board of Commissioners is necessary before the grant document is submitted to the Department of Revenue.

BOARD OF
COUNTY COMMISSIONERS
1994 FEB 10 AM 8:19
MULTNOMAH COUNTY
OREGON

SIGNATURES REQUIRED:

ELECTED OFFICIAL: Beverly Stein 

OR

DEPARTMENT MANAGER: _____

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

*Certified True Copy of Resolution 94-29 sent to Dave Warren on
& Copy sent to Janice Druian on*



MULTNOMAH COUNTY OREGON

DIVISION OF ASSESSMENT & TAXATION
610 S.W. ALDER
PORTLAND, OREGON 97205-3603

TAX INFORMATION: (503) 248-3326
APPRAISAL SECTIONS: (503) 248-3367
RECORD MANAGEMENT: (503) 248-3375
ADMINISTRATION: (503) 248-3323

Fri, Feb 4, 1994

TO: Board of County Commissioners
FROM: Betsy Williams, Director *Betsy Williams*
Department of Environmental Services
SUBJECT: Resolution to Approve FY 1994-95 Grant Budget for
the Division of Assessment and Taxation

I. Recommendation/Action Requested:

- Approval of budget for Assessment and Taxation

II. Background/Analysis:

- House Bill 2338 (1989) requires all county offices of Assessment and Taxation to provide approved (by County Commissions) budgets to the Department of Revenue (DOR) by March 1.

III. Financial Impact:

- The submitted budget is within parameters of the budget constraint set for the general fund;
- The budget recommends only one inmate crew for property maintenance of tax foreclosed properties (reduction of two crews from last year's budget). This is due to a reduction in tax foreclosed property inventory.
- There is an increase in both Tax Collection and Tax Title, because we are purchasing title searches for properties about to be foreclosed and for foreclosed properties. This is necessary for us to assure clean title when transferring properties to other agencies.

IV. Legal Issues:

N/A

V. Controversial Issues:

N/A

VI. Link to Current County Policies:

Almost all policies and procedures for the assessment, taxation and records management functions are covered by the Oregon Revised Statutes; The Tax Title function is governed by Multnomah County ordinances.

VII. Citizen Participation:

N/A

VIII. Other Government Participation:

- This budget is reviewed and authorized by the DOR

BEFORE THE BOARD OF COUNTY COMMISSIONERS

MULTNOMAH COUNTY, OREGON

In the Matter of Certifying
an Estimate of Expenditures
for the FY 1994-95 Property
Tax Program in Accordance
with HB 2338

RESOLUTION

94-29

WHEREAS, House Bill 2338, hereinafter referred to as HB 2338, which passed during the 1989 legislative session significantly altered the funding structure for Assessment & Taxation; and

WHEREAS, in Multnomah County, meeting the requirements of HB 2338 will result in additional expenditures for Assessment & Taxation over the next several years; and

WHEREAS, a major purpose of HB 2338 is to bring Assessment and Taxation operations into compliance with Oregon Department of Revenue regulations; and

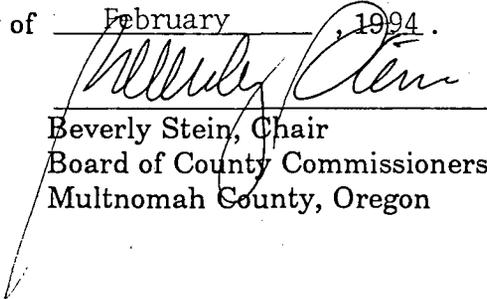
WHEREAS, HB 2338 created a statewide revenue pool to help offset the additional costs of being in full compliance with Department of Revenue regulations; and

WHEREAS, HB 2338 requires counties to file by March 1 of each calendar year an estimate of expenditures for their total Property Tax Program with the Department of Revenue; and

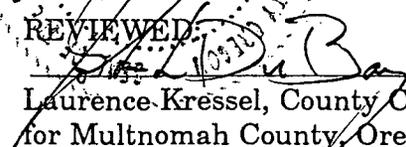
WHEREAS, Assessment & Taxation has prepared such an estimate of expenditures in accordance with HB 2338 and Department of Revenue administrative guidelines;

NOW THEREFORE BE IT RESOLVED that the attached estimate of expenditures for the fiscal year 1994-95 Property Tax Program for the County of Multnomah is certified for filing with the Department of Revenue as required by HB 2338.

ADOPTED this 17th day of February, 1994.


Beverly Stein, Chair
Board of County Commissioners
Multnomah County, Oregon

REVIEWED:


Laurence Kressel, County Counsel
for Multnomah County, Oregon

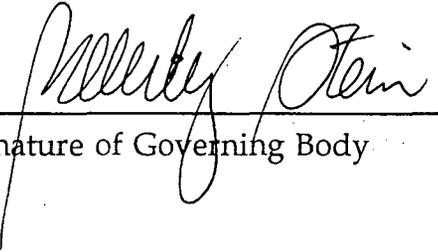
GRANT DOCUMENT RESOLUTION

Multnomah County is applying to the Department of Revenue in order to participate in the Assessment and Taxation Grant. This grant provides funding for counties to help them come into compliance or remain in compliance with ORS 308.027, 308.232, 308.234, Chapters 309, 310, 311, 312, and other laws requiring equity and uniformity in the system of property taxation.

Multnomah County has undertaken a self-assessment of its compliance with the laws and rules which govern the Oregon property tax system.

Multnomah County is generally in compliance with ORS 308.027, 308.232, 308.234, Chapters 309, 310, 311, 312, and other laws requiring equity and uniformity in the system of property taxation. Where the county is not in compliance, a plan or an amended plan has been or is being submitted to the department for approval. Where there is a plan in place, the county is in compliance with the plan as approved by the Department of Revenue.

The Property Tax Grant Document has been reviewed by the county governing body and constitutes the county's program to maintain and achieve compliance with the requirement of the Oregon property tax system. Multnomah County designates Janice Druian, phone number 348-3345, as the county contact person for this grant document.



Signature of Governing Body

February 17, 1994
Date Signed

ADMINISTRATION SECTION

Administration is directing the plans as submitted in prior years.

RECORDS MANAGEMENT/CARTOGRAPHY SECTION

We are following the plan that is on file with the Oregon Department of Revenue. Baring budget problems, the plan is still very reasonable.

The 1992 Performance Audit recommended that we consolidate the non-buildable parcels with the contiguous parcel that is under the same ownership, levy code, map, and no delinquent taxes. An agreement has been reached with the D.O.R. Mapping Section on this subject. We, Multnomah County, will audit all of the tax accounts and request consolidations of all non-buildable parcels.

To-date 8.75 square miles have been audited and taxpayers asked to approve consolidations. We had a very good response. We had to stop as we were running into conflicts as new maps were delivered. So we are starting in the area that has been placed into service and going forward. The whole project will be completed when the last letter is returned to us.

TECHNICAL SUPPORT SECTION

The Technical Support Section is following the plan that has been developed for development of the new A & T Section on the mainframe computer supported by the Information Services Division. In conjunction with this plan Technical Support is in the process of converting its data entry operation from the XL40 mini-computer system to a modern, PC-based data entry system.

APPRAISAL SECTION

The Residential Section has completed its plan to return to compliance with the six year reappraisal cycle upon the completion of district two, with the exception of apartments from 5 to 21 units which are being kept in line with the Commercial Section. Upon completion of physical reappraisal of districts three, and four all residential properties will have been reviewed using the latest classing system.

The Commercial Section is in the second year of not meeting the reappraisal cycle and is about one and one half district out of compliance; but only one half district behind the Residential Section. We are continuing to implement changes as stated in the response to the performance review. These enhancements include additional documentation of appraisal set up data and the development of a computer data base to store commercial property characteristics and to calculate replacement costs. We have developed and implemented a data base to store income data for commercial properties and expect to be back in cycle within the next five years.

GRANT DOCUMENT STAFFING REPORT

Multnomah County	Approved FTE's Current Year 93\94	Budgeted FTE's Coming Year 94/95	Change (plus or Minus)
ADMINISTRATIVE STAFF (Assessor, Support)	5	4	-1
ASSESSMENT RECORDS STAFF:	Incl. in Cartography		
APPRAISAL STAFF:			
Chief Appraisers	2	2	
Appraiser Supervisors	9	9	
Residential appraisers	20	20	
Commercial/industrial appraisers	17	18	+1
Farm/Forest/Rural Appraisers	2	2	
Mobile Home Appraisers	1	1	
Personal Property Appraisers/Specialists	9	8	-1
Sales Data analysts	2	1	-1
Other appraisers	-	-	
Exemption analysts	1	1	
Clerical Support	22	22	
TOTAL APPRAISAL STAFF	85	84	-1
TAX COLLECTION STAFF:			
Real Property	23	24	+1
Personal Property	5.5	4.5	-1
Tax Distribution	1.5	1.5	
TOTAL TAX COLLECTION STAFF	30	30	
CARTOGRAPHY STAFF	1	1	
Cartographic Supervisor	1	1	
Lead Cartographer	0	0	
Cartographer	4	4	
Deed or Abstract Clerk	14	14	
TOTAL CARTOGRAPHY STAFF	20	20	
CLERK/BOE/BORR	2	2	
A & T DATA PROCESSING STAFF	20.03	20.03	
TOTAL A & T STAFF	162.03	160.03	-2

Please explain any staffing changes made to the above categories for the approved current year.

NUMBER OF ACCOUNTS	Totals	OTHER APPRAISALS	Number of:
Real Property Accounts	223,075	New construction Accounts	6,000
Personal Property Accounts	38,050	Segregations	4,822
Utility Accounts	74	Disqualifications from special assessment	15 - 20
		Exemptions requiring application	7,000
		Other exemptions	1,168
APPEAL WORK	Number of:	BOARDS	
Petitions to BOE	5,900	Boards of Equalization	3
Petitions to BORR	100	Boards of Ratio Review	1
Petitions to DOR	1,473		
Petitions to Tax Court	25		

Please Include a copy of the assessor's report as required by ORS 308.050

MULTNOMAH COUNTY

EXPENDITURES FOR:	A VALUATION	B RECORDS ASSESSMENT	C BOARDS OF EQUALIZATION	D TAX COLLECTION & DISTRIBUTION	E CADASTRAL MAPPING	F DATA PROCESSING	G TOTAL
1. Personal Services *1	4,438,751	892,544	108,731	1,228,340		675,044	7,343,411
2. Materials & Services *1	573,300	385,937	108,509	1,089,534		1,524,828 A	3,682,107
3. Cost of Transportation *2 (Do Not Include in Materials & Services or Capital Outlay)	105,269	890	162	4,904		2,180	113,405
4. Capital Outlay (Do Not Include in Materials & Services)	0	11,000	0	3,000		46,200 *3	60,200 *4
5. TOTAL	5,117,320	1,290,371	217,403	2,325,778	0	2,248,251	11,199,123

*1 Do Not Include Any Amount That Is Included in Capital Outlay.

*2 Specify The Method Used To Determine Cost Of Transportation:

The estimate of the actual cost of operating the vehicle for a 12 month period plus a depreciation allowance for the useful life of the vehicle.

The rate per mile used in the County with an estimate of miles driven.
Rate per Mile _____ Est. of Miles _____

*3 Data Processing And Capital Outlay Includes Personal Services And Materials & Services For All New Data Processing Development And All Data Processing Equipmen

*4 Capital Outlay Is Limited To Either 6 Percent Of The Total Dollars Certified Or \$50,000, Whichever Is Greater.

5 Specify The Method Used To Determine Indirect Costs:

Percent Amount Approved By A Federal Granting Agency ..

.0444% of _____ 11,138,923

(INCLUDED IN TOTALS ABOVE)

5 Percent of Total Direct Expenditures Less Capital Outlay.

Total Indirect Costs _____

*6 Total Eligible For Grant _____ \$11,199,123

7 Total Expenditures Certified For Consideration In Grant
(Total of 5 and 6) _____ \$11,199,123

A: \$0 Cost of System Project may need to be reflected in Capital (G.4) instead of Materials & Services. (F3)

MULTNOMAH COUNTY

EXPENDITURES FOR:	A VALUATION	B RECORDS ASSESSMENT	C BOARDS OF EQUALIZATION	D TAX COLLECTION & DISTRIBUTION	E CADASTRAL MAPPING	F DATA PROCESSING	G TOTAL
1. Personal Services *1	4,438,751	892,544	108,731	1,228,340		675,044	7,343,411
2. Materials & Services *1	573,300	385,937	108,509	1,089,534		1,524,828 A	3,682,107
3. Cost of Transportation *2 (Do Not Include in Materials & Services or Capital Outlay)	105,269	890	162	4,904		2,180	113,405
4. Capital Outlay (Do Not Include in Materials & Services)	0	11,000	0	3,000		46,200 *3	60,200 *4
5. TOTAL	5,117,320	1,290,371	217,403	2,325,778	0	2,248,251	11,199,123 *6

*1 Do Not Include Any Amount That Is Included in Capital Outlay.

*2 Specify The Method Used To Determine Cost Of Transportation:

The estimate of the actual cost of operating the vehicle for a 12 month period plus a depreciation allowance for the useful life of the vehicle.

The rate per mile used in the County with an estimate of miles driven.
Rate per Mile _____ Est. of Miles _____

*3 Data Processing And Capital Outlay Includes Personal Services And Materials & Services For All New Data Processing Development And All Data Processing Equipmen

*4 Capital Outlay Is Limited To Either 6 Percent Of The Total Dollars Certified Or \$50,000, Whichever Is Greater.

5 Specify The Method Used To Determine Indirect Costs:

Percent Amount Approved By A Federal Granting Agency.
_____ .0444% of _____ 11,138,923
(INCLUDED IN TOTALS ABOVE)
 5 Percent of Total Direct Expenditures Less Capital Outlay.

Total Indirect Costs _____

*6 Total Eligible For Grant _____ \$11,199,123

7 Total Expenditures Certified For Consideration In Grant
(Total of 5 and 6) _____ \$11,199,123

A: \$0 Cost of System Project may need to be reflected in Capital (G.4) instead of Materials & Services. (F3)

Might be corrected page 94-29
CARRE - I put NEW PAGE IN RESOLUTION BOOK & WITH ORIGINAL

MULTNOMAH COUNTY

EXPENDITURES FOR:	A VALUATION	B RECORDS ASSESSMENT	C BOARDS OF EQUALIZATION	D TAX COLLECTION & DISTRIBUTION	E CADASTRAL MAPPING	F DATA PROCESSING	G TOTAL
1. Personal Services *1	4,438,751	892,544	108,731	1,228,340		675,044	7,343,410
2. Materials & Services *1	573,300	365,937	108,509	1,126,065		1,524,828 A	3,718,638
3. Cost of Transportation *2 (Do Not Include in Materials & Services or Capital Outlay)	105,269	890	162	4,904		2,180	113,405
4. Capital Outlay (Do Not Include in Materials & Services)	0	11,000	0	3,000		46,200 *3	60,200
5. TOTAL	5,117,320	1,290,371	217,402	2,362,309	0	2,248,252	11,235,853

*1 Do Not Include Any Amount That is Included in Capital Outlay.

*2 Specify The Method Used To Determine Cost Of Transportation:

The estimate of the actual cost of operating the vehicle for a 12 month period plus a depreciation allowance for the useful life of the vehicle.

The rate per mile used in the County with an estimate of miles driven.

Rate per Mile _____ Est. of Miles _____

*3 Data Processing And Capital Outlay Includes Personal Services And Materials & Services For All New Data Processing Development And All Data Processing Equipment

*CORRECTED
 COPY FOR
 YOUR FILE*

*4 Capital Outlay Is Limited To Either 6 Percent Of The Total Dollars Certified Or \$50,000, Whichever Is Greater.

5 Specify The Method Used To Determine Indirect Costs:

Percent Amount Approved By A Federal Granting Agency.

_____ .0444% of _____ 11,175,453
 (INCLUDED IN TOTALS ABOVE)

5 Percent of Total Direct Expenditures Less Capital Outlay.

Total Indirect Costs _____

*6 Total Eligible For Grant _____ \$11,235,853

7 Total Expenditures Certified For Consideration In Grant
 (Total of 5 and 6) _____ \$11,235,853

A: \$0 Cost of System Project may need to be reflected in Capital (G4) Instead of Materials & Services. (F3)

BUD 1

BUDGET REQUEST	AGENCY DGS LGFS CODE	ORGANIZATION A & T (ALL+BOE+TAXT+FTT)		PREPARED BY CAL SMITH	
		FUND	AGENCY	ORGANIZATION	DATE
		175 & 100	030	ALL A & T	02/01/94 BUD94A.WK3
OBJECT DETAIL		CURRENT BUDGET 93-94	REQUEST BUDGET 94-95	NET DIFF	
5100 PERMANENT		4,978,048	5,242,746	264,698	
5200 TEMPORARY		114,488	125,321	10,833	
5300 OVERTIME		9,115	15,244	6,129	
5400 PREMIUM PAY		12,279	14,394	2,115	
5500 FRINGE		1,353,237	1,372,846	19,608	
DIRECT PERSONAL SERVICES		6,467,167	6,770,551	303,384	
5550 INS BENEFITS		899,710	962,135	62,425	
PERSONAL SERVICES		7,366,877	7,732,686	365,808	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES		354,574	385,352	30,778	
6120 PRINTING		88,200	102,420	14,220	
6130 UTILITIES		2,500	3,000	500	
6140 COMMUNICATIONS		500	0	(500)	
6170 RENTALS		54,469	31,378	(23,091)	
6180 REPAIRS & MAINTENANCE		175,361	396,775	221,414	
6190 MAINTENANCE CONTRACTS		103,294	76,295	(26,999)	
6200 POSTAGE (See 7560)		0	50	50	
6230 SUPPLIES		159,951	142,570	(17,381)	
6270 FOOD		250	250	0	
6310 EDUCATION & TRAINING		60,814	40,824	(19,990)	
6330 TRAVEL		71,364	73,576	2,212	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		1,400	2,000	600	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		4,970	8,273	3,303	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		1,077,647	1,262,763	185,116	
7100 INDIRECT COSTS(at .0444 of PER, M&S, 7xxx)		369,475	473,543	104,068	
7150 TELEPHONE		85,050	90,056	5,006	
7200 DATA PROC SERVICES		1,647,510	1,232,450	(415,060)	
7300 MOTOR POOL SERVICES		42,108	40,209	(1,899)	
7400 BLDG. MGT. SERVICES		297,323	388,873	91,550	
7500 OTHER INT. SERVICES		251,560	162,561	(88,999)	
7560 DISTRIBUTION/POSTAGE		256,276	312,906	56,630	
INTERNAL SVC. REIMBURSEMENTS		2,949,302	2,700,598	(248,704)	
TOTAL MATERIAL/SERVICES		4,026,949	3,963,361	(63,588)	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		82,700	71,700	(11,000)	
CAPITAL OUTLAY		82,700	71,700	(11,000)	
	DIRECT BUDGET	7,594,514	8,081,014	486,500	
	TOTAL BUDGET	11,476,527	11,767,747	291,221	

THIS FILE(BUD94A.WK3) DRAWS FROM MODELS BUD94APP.WK3 BUD94APR.WK3 BUD94APC.WK3

BUD94APS.WK3 BUD94RM.WK3 BUD94TS.WK3 BUD94RR.WK3 BUD94AD.WK3

BUD94TC.WK3 BUD94BOE.WK3 BUD94TAX.WK3 BUD94FTT.WK3 BUD94LL.WK3

BUD94A.WK3

BUD 1

BUDGET REQUEST	AGENCY DGS LGFS CODE	ORGANIZATION A & T (Less LI&RG+BOE+TAX+FTT)		PREPARED BY	CAL SMITH
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	ALL A & T	02/01/94 BUD94B.WK3
OBJECT DETAIL		CURRENT BUDGET 93-94	REQUEST BUDGET 94-95	NET DIFF	
5100 PERMANENT		4,748,435	4,986,140	237,706	
5200 TEMPORARY		108,068	122,296	14,228	
5300 OVERTIME		9,115	15,244	6,129	
5400 PREMIUM PAY		11,529	9,394	(2,135)	
5500 FRINGE		1,290,655	1,304,910	14,255	
DIRECT PERSONAL SERVICES		6,167,801	6,437,985	270,183	
5550 INS BENEFITS		852,651	905,426	52,775	
PERSONAL SERVICES		7,020,453	7,343,411	322,958	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES		354,574	385,352	30,778	
6120 PRINTING		54,200	60,600	6,400	
6130 UTILITIES		2,500	3,000	500	
6140 COMMUNICATIONS		500	0	(500)	
6170 RENTALS		27,178	27,478	300	
6180 REPAIRS & MAINTENANCE		172,261	391,675	219,414	
6190 MAINTENANCE CONTRACTS		98,806	71,595	(27,211)	
6200 POSTAGE (See 7560)		0	50	50	
6230 SUPPLIES		150,277	129,220	(21,057)	
6270 FOOD		250	250	0	
6310 EDUCATION & TRAINING		59,486	38,924	(20,562)	
6330 TRAVEL		70,912	73,196	2,284	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		1,400	2,000	600	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		4,970	8,273	3,303	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		997,314	1,191,613	194,299	
7100 INDIRECT COSTS(at .0444 of PER, M&S, 7xxx)		369,475	473,543	104,068	
7150 TELEPHONE		78,291	83,077	4,786	
7200 DATA PROC SERVICES		1,647,510	1,232,450	(415,060)	
7300 MOTOR POOL SERVICES		42,108	40,209	(1,899)	
7400 BLDG. MGT. SERVICES		297,323	360,403	63,080	
7500 OTHER INT. SERVICES		251,560	162,561	(88,999)	
7560 DISTRIBUTION/POSTAGE		212,726	251,656	38,930	
INTERNAL SVC.-REIMBURSEMENTS		2,898,993	2,603,899	(295,094)	
TOTAL MATERIAL/SERVICES		3,896,307	3,795,512	(100,795)	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		62,700	60,200	(2,500)	
CAPITAL OUTLAY		62,700	60,200	(2,500)	
	DIRECT BUDGET	7,214,815	7,677,298	462,482	
	TOTAL BUDGET	10,979,460	11,199,123	219,664	

THIS FILE(BUD94B.WK3) DRAWS FROM MODELS BUD94APP.WK3 BUD94APR.WK3 BUD94APC.WK3
 BUD94APS.WK3 BUD94RM.WK3 BUD94TS.WK3 BUD94AD.WK3
 BUD94TC.WK3 BUD94BOE.WK3 BUD94TAX.WK3 BUD94FTT.WK3

BUD94B.WK3

BUD 1

BUDGET REQUEST	AGENCY DGS LGFS CODE	ORGANIZATION A & T (Less LI&RG+BOE-TAXT-FTT)		PREPARED BY	CAL SMITH
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	ALL A & T	02/01/94 BUD94C.WK3
OBJECT DETAIL		CURRENT BUDGET 93-94	REQUEST BUDGET 94-95	NET DIFF	
5100 PERMANENT		4,605,271	4,826,895	221,624	
5200 TEMPORARY		108,068	122,296	14,228	
5300 OVERTIME		2,126	11,000	8,874	
5400 PREMIUM PAY		11,529	9,394	(2,135)	
5500 FRINGE		1,252,134	1,262,620	10,486	
DIRECT PERSONAL SERVICES		5,979,127	6,232,205	253,078	
5550 INS BENEFITS		823,497	872,827	49,329	
PERSONAL SERVICES		6,802,625	7,105,032	302,407	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES		332,074	365,352	33,278	
6120 PRINTING		53,700	60,100	6,400	
6130 UTILITIES		0	0	0	
6140 COMMUNICATIONS		500	0	(500)	
6170 RENTALS		19,678	19,978	300	
6180 REPAIRS & MAINTENANCE		37,025	41,675	4,650	
6190 MAINTENANCE CONTRACTS		98,806	71,595	(27,211)	
6200 POSTAGE (See 7560)		0	50	50	
6230 SUPPLIES		146,777	128,220	(18,557)	
6270 FOOD		250	250	0	
6310 EDUCATION & TRAINING		58,986	37,924	(21,062)	
6330 TRAVEL		70,912	73,196	2,284	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		1,400	2,000	600	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		4,670	8,023	3,353	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		824,778	808,363	(16,415)	
7100 INDIRECT COSTS(at .0444 of PER, M&S,7xxx)		349,632	440,821	91,189	
7150 TELEPHONE		74,803	79,438	4,635	
7200 DATA PROC SERVICES		1,647,510	1,232,450	(415,060)	
7300 MOTOR POOL SERVICES		36,608	36,609	1	
7400 BLDG. MGT. SERVICES		295,211	354,243	59,032	
7500 OTHER INT. SERVICES		69,800	65,605	(4,195)	
7560 DISTRIBUTION/POSTAGE		208,226	246,656	38,430	
INTERNAL SVC. REIMBURSEMENTS		2,681,790	2,455,822	(225,968)	
TOTAL MATERIAL/SERVICES		3,506,568	3,264,185	(242,383)	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		61,200	58,700	(2,500)	
CAPITAL OUTLAY		61,200	58,700	(2,500)	
DIRECT BUDGET		6,853,605	7,088,268	234,663	
TOTAL BUDGET		10,370,393	10,427,917	57,524	

THIS FILE(BUD94B.WK3) DRAWS FROM MODELS BUD94APP.WK3 BUD94APR.WK3 BUD94APC.WK3
 BUD94APS.WK3 BUD94RM.WK3 BUD94TS.WK3 BUD94AD.WK3
 BUD94TC.WK3 BUD94BOE.WK3

BUD94C.WK3

BUD 1

BUDGET REQUEST	AGENCY DGS LGFS CODE	ORGANIZATION A & T (ALL+BOE & NO tax title)		PREPARED BY CAL SMITH	
		FUND	AGENCY	ORGANIZATION	DATE
		175 & 100	030	ALL A & T	02/01/94 BUD94D.WK3
OBJECT DETAIL		CURRENT BUDGET 93-94	REQUEST BUDGET 94-95	NET DIFF	
5100 PERMANENT		4,834,884	5,083,501	248,616	
5200 TEMPORARY		114,488	125,321	10,833	
5300 OVERTIME		2,126	11,000	8,874	
5400 PREMIUM PAY		12,279	14,394	2,115	
5500 FRINGE		1,314,716	1,330,556	15,839	
DIRECT PERSONAL SERVICES		6,278,493	6,564,772	286,278	
5550 INS BENEFITS		870,556	929,535	58,979	
PERSONAL SERVICES		7,149,049	7,494,307	345,257	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES		332,074	365,352	33,278	
6120 PRINTING		87,700	101,920	14,220	
6130 UTILITIES		0	0	0	
6140 COMMUNICATIONS		500	0	(500)	
6170 RENTALS		46,969	23,878	(23,091)	
6180 REPAIRS & MAINTENANCE		40,125	46,775	6,650	
6190 MAINTENANCE CONTRACTS		103,294	76,295	(26,999)	
6200 POSTAGE (See 7560)		0	50	50	
6230 SUPPLIES		156,451	141,570	(14,881)	
6270 FOOD		250	250	0	
6310 EDUCATION & TRAINING		60,314	39,824	(20,490)	
6330 TRAVEL		71,364	73,576	2,212	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		1,400	2,000	600	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		4,670	8,023	3,353	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		905,111	879,513	(25,598)	
7100 INDIRECT COSTS(at .0444 of PER, M&S,7xxx)		349,632	440,821	91,189	
7150 TELEPHONE		81,562	86,417	4,855	
7200 DATA PROC SERVICES		1,647,510	1,232,450	(415,060)	
7300 MOTOR POOL SERVICES		36,608	36,609	1	
7400 BLDG. MGT. SERVICES		295,211	382,713	87,502	
7500 OTHER INT. SERVICES		69,800	65,605	(4,195)	
7560 DISTRIBUTION/POSTAGE		251,776	307,906	56,130	
INTERNAL SVC. REIMBURSEMENTS		2,732,099	2,552,521	(179,578)	
TOTAL MATERIAL/SERVICES		3,637,210	3,432,034	(205,176)	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		81,200	70,200	(11,000)	
CAPITAL OUTLAY		81,200	70,200	(11,000)	
DIRECT BUDGET		7,233,304	7,491,985	258,680	
TOTAL BUDGET		10,867,460	10,996,541	129,082	

THIS FILE(BUD94D.WK3) DRAWS FROM MODELS BUD94APP.WK3 BUD94APR.WK3 BUD94APC.WK3
 BUD94APS.WK3 BUD94RM.WK3 BUD94TS.WK3 BUD94AD.WK3
 BUD94TC.WK3 BUD94BOE.WK3 BUD94LL.WK3 BUD94RR.WK3

BUD94D.WK3

EXPENDITURE BUDGET SPREADSHEET

ORGANIZATION: A & T DIVISION
 PREPARED BY: CALVIN J. SMITH

FUND 175 DATE
 & 100 02/01/94

Code	Object Detail	ADMIN	TECH	RECORDS	APPRAISAL	APPRAISAL	APPRAISAL	APPRAISAL	TAX	SPECIAL	BOARD	FACILITIES	TAX	FUND 100	FUND 100	BOTH
		ORG 7565	ORG 7566	ORG 7570	ORG 7620 7685	ORG 7610	ORG 7600	ORG 7590	ORG 7630	ORG 9481	ORG 7390	ORG 5655	ORG 5655	ORG 7575	ORG 7635	TOTAL FUND & 175 BUDGET
5100	PERMANENT	\$142,116	\$435,861	\$615,352	\$636,168	\$1,083,661	\$305,755	\$891,215	\$654,907		\$61,860	\$76,338	\$82,907	\$192,514	\$64,092	\$5,242,746
5200	TEMPORARY	\$2,274	\$27,050	\$3,025	\$35,856	\$0	\$0	\$0	\$32,892		\$21,199	\$0	\$0	\$3,025	\$0	\$125,321
5300	OVERTIME	\$0	\$7,500	\$0	\$0	\$0	\$0	\$0	\$3,500		\$0	\$3,494	\$750	\$0	\$0	\$15,244
5400	PREMIUM PAY	\$2,798	\$4,686	\$0	\$0	\$0	\$0	\$1,910	\$0		\$0	\$0	\$0	\$5,000	\$0	\$14,394
5500	FRINGE	\$36,696	\$118,136	\$159,426	\$167,135	\$280,318	\$79,092	\$231,029	\$173,033		\$17,755	\$20,650	\$21,640	\$51,356	\$16,580	\$1,372,846
	DIRECT PERSONAL SERVICES	\$183,884	\$593,233	\$777,803	\$839,159	\$1,363,979	\$384,847	\$1,124,154	\$864,332		\$100,814	\$100,482	\$105,297	\$251,895	\$80,672	\$6,770,551
5550	INS BENEFITS	\$18,259	\$81,810	\$114,741	\$129,953	\$186,223	\$57,527	\$150,766	\$125,629		\$7,918	\$16,015	\$16,584	\$44,729	\$11,979	\$962,135
	PERSONAL SERVICES	\$202,143	\$675,044	\$892,544	\$969,112	\$1,550,202	\$442,374	\$1,274,920	\$989,961		\$108,731	\$116,497	\$121,882	\$296,624	\$92,651	\$7,732,686
6050	COUNTY SUPPLEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6060	PASS THROUGH PAYMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6110	PROFESSIONAL SERVICES	\$7,160	\$55,600	\$139,200	\$1,400	\$2,400	\$0	\$0	\$99,300		\$60,292	\$0	\$20,000	\$0	\$0	\$385,352
6120	PRINTING	\$5,000	\$500	\$13,600	\$5,500	\$3,500	\$2,500	\$2,500	\$21,000		\$6,000	\$0	\$500	\$35,820	\$6,000	\$102,420
6130	UTILITIES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$3,000	\$0	\$0	\$0	\$3,000
6140	COMMUNICATIONS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0	\$0	\$0	\$0	\$0
6170	RENTALS	\$0	\$0	\$16,378	\$0	\$0	\$0	\$0	\$3,600		\$0	\$7,500	\$0	\$3,600	\$300	\$31,378
6180	REPAIRS & MAINTENANCE	\$1,000	\$28,075	\$7,000	\$2,000	\$1,200	\$0	\$0	\$2,000		\$400	\$350,000	\$0	\$5,000	\$100	\$396,775
6190	MAINTENANCE CONTRACTS	\$250	\$5,595	\$47,250	\$250	\$250	\$0	\$0	\$18,000		\$0	\$0	\$0	\$3,500	\$1,200	\$76,295
6200	POSTAGE (see 7560)	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0	\$0	\$0	\$0	\$50
6230	SUPPLIES	\$11,000	\$60,970	\$22,100	\$10,940	\$7,710	\$1,100	\$4,250	\$8,150		\$2,000	\$500	\$500	\$12,900	\$450	\$142,570
6270	FOOD	\$250	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0	\$0	\$0	\$0	\$250
6310	EDUCATION & TRAINING	\$6,109	\$9,600	\$1,500	\$1,950	\$6,355	\$1,950	\$7,560	\$2,900		\$0	\$500	\$500	\$1,900	\$0	\$40,824
6330	TRAVEL	\$1,972	\$2,100	\$890	\$1,440	\$35,874	\$6,080	\$23,874	\$804		\$162	\$0	\$0	\$380	\$0	\$73,576
6520	INSURANCE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0	\$0	\$0	\$0	\$0
6530	EXTERNAL DATA PROCESSING	\$0	\$2,000	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0	\$0	\$0	\$0	\$2,000
6550	DRUGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6580	CLAIMS PAID	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6590	JUDGEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6610	AWARDS & PREMIUMS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6620	DUES & SUBSCRIPTIONS	\$1,659	\$1,087	\$560	\$1,200	\$1,610	\$100	\$1,475	\$332		\$0	\$150	\$100	\$0	\$0	\$8,273
7810	DEBT RETIREMENT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7820	INTEREST	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	DIRECT MATERIALS AND SERVICES	\$34,400	\$165,577	\$248,478	\$24,680	\$58,899	\$11,730	\$39,659	\$156,086		\$68,854	\$361,650	\$21,600	\$63,100	\$8,050	\$1,262,763
7100	INDIRECT COSTS(at.0444 EX of CAP)	\$12,453	\$93,615	\$54,389	\$48,037	\$72,706	\$22,524	\$61,830	\$66,025	\$0	\$9,242	\$24,817	\$7,905	\$0	\$0	\$473,543
7150	TELEPHONE	\$4,265	\$6,020	\$10,853	\$14,158	\$10,690	\$4,085	\$9,054	\$18,200		\$2,113	\$2,260	\$1,379	\$4,974	\$2,005	\$90,056
7200	DATA PROC SERVICES	\$0	\$1,232,450	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,232,450
7300	MOTOR POOL SERVICES	\$1,229	\$80	\$0	\$0	\$1,200	\$12,000	\$21,600	\$500		\$0	\$3,600	\$0	\$0	\$0	\$40,209
7400	BLDG. MGT. SERVICES	\$16,431	\$28,266	\$70,106	\$63,085	\$13,570	\$17,274	\$45,354	\$91,695		\$8,462	\$4,974	\$1,186	\$19,861	\$8,609	\$388,873
7500	OTHER INT. SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$65,605	\$0	\$0	\$69,956	\$27,000	\$0	\$0	\$162,561
7560	DISTRIBUTION/POSTAGE	\$22,011	\$1,000	\$3,000	\$10,880	\$2,955	\$19,830	\$1,980	\$165,000		\$20,000	\$0	\$5,000	\$61,200	\$50	\$312,906
	INTERNAL SVC. REIMBURSEMENTS	\$56,389	\$1,361,431	\$138,349	\$136,160	\$101,121	\$75,713	\$139,818	\$407,025	\$0	\$39,817	\$105,607	\$42,470	\$86,035	\$10,664	\$2,700,598
	TOTAL MATERIAL/SERVICES	\$90,789	\$1,527,008	\$386,827	\$160,840	\$160,020	\$87,443	\$179,477	\$563,111	\$0	\$108,671	\$467,257	\$64,070	\$149,135	\$18,714	\$3,963,361
8100	LAND	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8200	BUILDINGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8300	OTHER IMPROVEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8400	EQUIPMENT	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500		\$0	\$0	\$1,500	\$11,000	\$500	\$71,700
	CAPITAL OUTLAY	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500		\$0	\$0	\$1,500	\$11,000	\$500	\$71,700
	DIRECT BUDGET	\$218,284	\$805,010	\$1,026,281	\$863,839	\$1,422,878	\$396,577	\$1,163,813	\$1,021,918	\$0	\$169,668	\$462,132	\$126,897	\$314,995	\$88,722	\$8,081,014
	TOTAL BUDGET	\$292,933	\$2,248,251	\$1,290,371	\$1,129,952	\$1,710,222	\$529,817	\$1,454,397	\$1,554,572	\$0	\$217,403	\$583,754	\$187,452	\$456,759	\$111,865	\$11,767,747

FILENAME: BUD94FUN.WK3

EXPENDITURE BUDGET SPREADSHEET

ORGANIZATION: A & T DIVISION

FUND 175 DATE

PREPARED BY: CALVIN J. SMITH

02/01/94

FUND 175

Code	Object Detail	ADMIN	TECH	RECORDS	APPRAISAL	APPRAISAL	APPRAISAL	APPRAISAL	TAX	BOARD	FACILITIES	TAX	TOTAL
		ORG 7565	ORG 7566	ORG 7570	ORG 7620 7685	ORG 7610	ORG 7600	ORG 7590	ORG 7630	COLLECT	OF EQUAL	TAX TITLE	
5100	PERMANENT	\$142,116	\$435,861	\$615,352	\$636,168	\$1,083,661	\$305,755	\$891,215	\$654,907	\$61,860	\$76,338	\$82,907	\$4,986,140
5200	TEMPORARY	\$2,274	\$27,050	\$3,025	\$35,856	\$0	\$0	\$0	\$32,892	\$21,199	\$0	\$0	\$122,296
5300	OVERTIME	\$0	\$7,500	\$0	\$0	\$0	\$0	\$0	\$3,500	\$0	\$3,494	\$750	\$15,244
5400	PREMIUM PAY	\$2,798	\$4,686	\$0	\$0	\$0	\$0	\$1,910	\$0	\$0	\$0	\$0	\$9,394
5500	FRINGE	\$36,696	\$118,136	\$159,426	\$167,135	\$280,318	\$79,092	\$231,029	\$173,033	\$17,755	\$20,650	\$21,640	\$1,304,910
	DIRECT PERSONAL SERVICES	\$183,884	\$593,233	\$777,803	\$839,159	\$1,363,979	\$384,847	\$1,124,154	\$864,332	\$100,814	\$100,482	\$105,297	\$6,437,985
5550	INS BENEFITS	\$18,259	\$81,810	\$114,741	\$129,953	\$186,223	\$57,527	\$150,766	\$125,629	\$7,918	\$16,015	\$16,584	\$905,426
	PERSONAL SERVICES	\$202,143	\$675,044	\$892,544	\$969,112	\$1,550,202	\$442,374	\$1,274,920	\$989,961	\$108,731	\$116,497	\$121,882	\$7,343,411
6050	COUNTY SUPPLEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6060	PASS THROUGH PAYMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6110	PROFESSIONAL SERVICES	\$7,160	\$55,600	\$139,200	\$1,400	\$2,400	\$0	\$0	\$99,300	\$60,292	\$0	\$20,000	\$385,352
6120	PRINTING	\$5,000	\$500	\$13,600	\$5,500	\$3,500	\$2,500	\$2,500	\$21,000	\$6,000	\$0	\$500	\$60,600
6130	UTILITIES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,000	\$0	\$3,000
6140	COMMUNICATIONS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6170	RENTALS	\$0	\$0	\$16,378	\$0	\$0	\$0	\$0	\$3,600	\$0	\$7,500	\$0	\$27,478
6180	REPAIRS & MAINTENANCE	\$1,000	\$28,075	\$7,000	\$2,000	\$1,200	\$0	\$0	\$2,000	\$400	\$350,000	\$0	\$391,675
6190	MAINTENANCE CONTRACTS	\$250	\$5,595	\$47,250	\$250	\$250	\$0	\$0	\$18,000	\$0	\$0	\$0	\$71,595
6200	POSTAGE (see 7560)	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$50
6230	SUPPLIES	\$11,000	\$60,970	\$22,100	\$10,940	\$7,710	\$1,100	\$4,250	\$8,150	\$2,000	\$500	\$500	\$129,220
6270	FOOD	\$250	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$250
6310	EDUCATION & TRAINING	\$6,109	\$9,600	\$1,500	\$1,950	\$6,355	\$1,950	\$7,560	\$2,900	\$0	\$500	\$500	\$38,924
6330	TRAVEL	\$1,972	\$2,100	\$890	\$1,440	\$35,874	\$6,080	\$23,874	\$804	\$162	\$0	\$0	\$73,196
6520	INSURANCE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6530	EXTERNAL DATA PROCESSING	\$0	\$2,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,000
6550	DRUGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6580	CLAIMS PAID	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6590	JUDGEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6610	AWARDS & PREMIUMS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6620	DUES & SUBSCRIPTIONS	\$1,659	\$1,087	\$560	\$1,200	\$1,610	\$100	\$1,475	\$332	\$0	\$150	\$100	\$8,273
7810	DEBT RETIREMENT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7820	INTEREST	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	DIRECT MATERIALS AND SERVICES	\$34,400	\$165,577	\$248,478	\$24,680	\$58,899	\$11,730	\$39,659	\$156,086	\$68,854	\$361,650	\$21,600	\$1,191,613
7100	INDIRECT COSTS(at.0444 EX of CAP)	\$12,453	\$93,615	\$54,389	\$48,037	\$72,706	\$22,524	\$61,830	\$66,025	\$9,242	\$24,817	\$7,905	\$473,543
7150	TELEPHONE	\$4,265	\$6,020	\$10,853	\$14,158	\$10,690	\$4,085	\$9,054	\$18,200	\$2,113	\$2,260	\$1,379	\$83,077
7200	DATA PROC SERVICES	\$0	\$1,232,450	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,232,450
7300	MOTOR POOL SERVICES	\$1,229	\$80	\$0	\$0	\$1,200	\$12,000	\$21,600	\$500	\$0	\$3,600	\$0	\$40,209
7400	BLDG. MGT. SERVICES	\$16,431	\$28,266	\$70,106	\$63,085	\$13,570	\$17,274	\$45,354	\$91,695	\$8,462	\$4,974	\$1,186	\$360,403
7500	OTHER INT. SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$65,605	\$0	\$69,956	\$27,000	\$162,561
7560	DISTRIBUTION/POSTAGE	\$22,011	\$1,000	\$3,000	\$10,880	\$2,955	\$19,830	\$1,980	\$165,000	\$20,000	\$0	\$5,000	\$251,656
	INTERNAL SVC. REIMBURSEMENTS	\$56,389	\$1,361,431	\$138,349	\$136,160	\$101,121	\$75,713	\$139,818	\$407,025	\$39,817	\$105,607	\$42,470	\$2,603,899
	TOTAL MATERIAL/SERVICES	\$90,789	\$1,527,008	\$386,827	\$160,840	\$160,020	\$87,443	\$179,477	\$563,111	\$108,671	\$467,257	\$64,070	\$3,795,512
8100	LAND	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8200	BUILDINGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8300	OTHER IMPROVEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8400	EQUIPMENT	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500	\$0	\$0	\$1,500	\$60,200
	CAPITAL OUTLAY	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500	\$0	\$0	\$1,500	\$60,200
	DIRECT BUDGET	\$218,284	\$805,010	\$1,026,281	\$863,839	\$1,422,878	\$396,577	\$1,163,813	\$1,021,918	\$169,668	\$462,132	\$126,897	\$7,677,298
	TOTAL BUDGET	\$292,933	\$2,248,251	\$1,290,371	\$1,129,952	\$1,710,222	\$529,817	\$1,454,397	\$1,554,572	\$217,403	\$583,754	\$187,452	\$11,199,123

FILENAME: BUD94175.WK3

EXPENDITURE BUDGET SPREADSHEET

ORGANIZATION: A & T DIVISION
 PREPARED BY: CALVIN J. SMITH

FUND 175 DATE
 02/01/94

FUND 175

Code	Object Detail	ADMIN	TECH	RECORDS	APPRAISAL	APPRAISAL	APPRAISAL	APPRAISAL	TAX	BOARD		TOTAL BUDGET
		ORG 7565	ORG 7566	ORG 7570	support/expt	Residential	Personal P	Comm/Indust	COLLECT	ORG 7630	ORG 7390	
5100	PERMANENT	\$142,116	\$435,861	\$615,352	\$636,168	\$1,083,661	\$305,755	\$891,215	\$654,907		\$61,860	\$4,826,895
5200	TEMPORARY	\$2,274	\$27,050	\$3,025	\$35,856	\$0	\$0	\$0	\$32,892		\$21,199	\$122,296
5300	OVERTIME	\$0	\$7,500	\$0	\$0	\$0	\$0	\$0	\$3,500			\$11,000
5400	PREMIUM PAY	\$2,798	\$4,686	\$0	\$0	\$0	\$0	\$1,910				\$9,394
5500	FRINGE	\$36,696	\$118,136	\$159,426	\$167,135	\$280,318	\$79,092	\$231,029	\$173,033		\$17,755	\$1,262,620
	DIRECT PERSONAL SERVICES	\$183,884	\$593,233	\$777,803	\$839,159	\$1,363,979	\$384,847	\$1,124,154	\$864,332		\$100,814	\$6,232,205
5550	INS BENEFITS	\$18,259	\$81,810	\$114,741	\$129,953	\$186,223	\$57,527	\$150,766	\$125,629		\$7,918	\$872,827
	PERSONAL SERVICES	\$202,143	\$675,044	\$892,544	\$969,112	\$1,550,202	\$442,374	\$1,274,920	\$989,961		\$108,731	\$7,105,032
6050	COUNTY SUPPLEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6060	PASS THROUGH PAYMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6110	PROFESSIONAL SERVICES	\$7,160	\$55,600	\$139,200	\$1,400	\$2,400	\$0	\$0	\$99,300		\$60,292	\$365,352
6120	PRINTING	\$5,000	\$500	\$13,600	\$5,500	\$3,500	\$2,500	\$2,500	\$21,000		\$6,000	\$60,100
6130	UTILITIES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6140	COMMUNICATIONS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6170	RENTALS	\$0		\$16,378	\$0	\$0	\$0	\$0	\$3,600			\$19,978
6180	REPAIRS & MAINTENANCE	\$1,000	\$28,075	\$7,000	\$2,000	\$1,200	\$0	\$0	\$2,000		\$400	\$41,675
6190	MAINTENANCE CONTRACTS	\$250	\$5,595	\$47,250	\$250	\$250	\$0	\$0	\$18,000			\$71,595
6200	POSTAGE (see 7560)	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$50
6230	SUPPLIES	\$11,000	\$60,970	\$22,100	\$10,940	\$7,710	\$1,100	\$4,250	\$8,150		\$2,000	\$128,220
6270	FOOD	\$250	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$250
6310	EDUCATION & TRAINING	\$6,109	\$9,600	\$1,500	\$1,950	\$6,355	\$1,950	\$7,560	\$2,900		\$0	\$37,924
6330	TRAVEL	\$1,972	\$2,100	\$890	\$1,440	\$35,874	\$6,080	\$23,874	\$804		\$162	\$73,196
6520	INSURANCE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6530	EXTERNAL DATA PROCESSING	\$0	\$2,000	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$2,000
6550	DRUGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6580	CLAIMS PAID	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6590	JUDGEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6610	AWARDS & PREMIUMS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
6620	DUES & SUBSCRIPTIONS	\$1,659	\$1,087	\$560	\$1,200	\$1,610	\$100	\$1,475	\$332			\$8,023
7810	DEBT RETIREMENT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
7820	INTEREST	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
	DIRECT MATERIALS AND SERVICES	\$34,400	\$165,577	\$248,478	\$24,680	\$58,899	\$11,730	\$39,659	\$156,086		\$68,854	\$808,363
7100	INDIRECT COSTS(at.0444 EX of CAP)	\$12,453	\$93,615	\$54,389	\$48,037	\$72,706	\$22,524	\$61,830	\$66,025		\$9,242	\$440,821
7150	TELEPHONE	\$4,265	\$6,020	\$10,853	\$14,158	\$10,690	\$4,085	\$9,054	\$18,200		\$2,113	\$79,438
7200	DATA PROC SERVICES	\$0	\$1,232,450	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$1,232,450
7300	MOTOR POOL SERVICES	\$1,229	\$80	\$0	\$0	\$1,200	\$12,000	\$21,600	\$500		\$0	\$36,609
7400	BLDG. MGT. SERVICES	\$16,431	\$28,266	\$70,106	\$63,085	\$13,570	\$17,274	\$45,354	\$91,695		\$8,462	\$354,243
7500	OTHER INT. SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$65,605		\$0	\$65,605
7560	DISTRIBUTION/POSTAGE	\$22,011	\$1,000	\$3,000	\$10,880	\$2,955	\$19,830	\$1,980	\$165,000		\$20,000	\$246,656
	INTERNAL SVC. REIMBURSEMENTS	\$56,389	\$1,361,431	\$138,349	\$136,160	\$101,121	\$75,713	\$139,818	\$407,025		\$39,817	\$2,455,822
	TOTAL MATERIAL/SERVICES	\$90,789	\$1,527,008	\$386,827	\$160,840	\$160,020	\$87,443	\$179,477	\$563,111		\$108,671	\$3,264,185
8100	LAND	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
8200	BUILDINGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
8300	OTHER IMPROVEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
8400	EQUIPMENT	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500		\$0	\$58,700
	CAPITAL OUTLAY	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500		\$0	\$58,700
	DIRECT BUDGET	\$218,284	\$805,010	\$1,026,281	\$863,839	\$1,422,878	\$396,577	\$1,163,813	\$1,021,918		\$169,668	\$7,088,268
	TOTAL BUDGET	\$292,933	\$2,248,251	\$1,290,371	\$1,129,952	\$1,710,222	\$529,817	\$1,454,397	\$1,554,572		\$217,403	\$10,427,917

EXPENDITURE BUDGET SPREADSHEET

ORGANIZATION: A & T DIVISION
 PREPARED BY: CALVIN J. SMITH

FUND 175 DATE
 & 100 02/01/94

Code	Object Detail	ADMIN	TECH	RECORDS	APPRAISAL	APPRAISAL	APPRAISAL	APPRAISAL	TAX	BOARD	FUND 100	FUND 100	BOTH		
		ORG	ORG	MGMT	support/expt	Residential	Personal P	Comm/Indust	COLLECT	OF EQUAL	RECORD-	LICENCE	& 175		
		7565	7566	7570	7620	7610	7600	7590	7630	7390	ING	& PASSPT	TOTAL		
					7685								BUDGET		
5100	PERMANENT	\$142,116	\$435,861	\$615,352	\$636,168	\$1,083,661	\$305,755	\$891,215	\$654,907	\$61,860			\$192,514	\$64,092	\$5,083,501
5200	TEMPORARY	\$2,274	\$27,050	\$3,025	\$35,856	\$0	\$0	\$0	\$32,892	\$21,199			\$3,025		\$125,321
5300	OVERTIME	\$0	\$7,500	\$0	\$0	\$0	\$0	\$0	\$3,500				\$0		\$11,000
5400	PREMIUM PAY	\$2,798	\$4,686	\$0	\$0	\$0	\$0	\$1,910					\$5,000		\$14,394
5500	FRINGE	\$36,696	\$118,136	\$159,426	\$167,135	\$280,318	\$79,092	\$231,029	\$173,033	\$17,755			\$51,356	\$16,580	\$1,330,556
	DIRECT PERSONAL SERVICES	\$183,884	\$593,233	\$777,803	\$839,159	\$1,363,979	\$384,847	\$1,124,154	\$864,332	\$100,814			\$251,895	\$80,672	\$6,564,772
5550	INS BENEFITS	\$18,259	\$81,810	\$114,741	\$129,953	\$186,223	\$57,527	\$150,766	\$125,629	\$7,918			\$44,729	\$11,979	\$929,535
	PERSONAL SERVICES	\$202,143	\$675,044	\$892,544	\$969,112	\$1,550,202	\$442,374	\$1,274,920	\$989,961	\$108,731			\$296,624	\$92,651	\$7,494,307
6050	COUNTY SUPPLEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6060	PASS THROUGH PAYMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6110	PROFESSIONAL SERVICES	\$7,160	\$55,600	\$139,200	\$1,400	\$2,400	\$0	\$0	\$99,300	\$60,292			\$0	\$0	\$365,352
6120	PRINTING	\$5,000	\$500	\$13,600	\$5,500	\$3,500	\$2,500	\$2,500	\$21,000	\$6,000			\$35,820	\$6,000	\$101,920
6130	UTILITIES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6140	COMMUNICATIONS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6170	RENTALS	\$0	\$0	\$16,378	\$0	\$0	\$0	\$0	\$3,600	\$0			\$3,600	\$300	\$23,878
6180	REPAIRS & MAINTENANCE	\$1,000	\$28,075	\$7,000	\$2,000	\$1,200	\$0	\$0	\$2,000	\$400			\$5,000	\$100	\$46,775
6190	MAINTENANCE CONTRACTS	\$250	\$5,595	\$47,250	\$250	\$250	\$0	\$0	\$18,000	\$0			\$3,500	\$1,200	\$76,295
6200	POSTAGE (see 7560)	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$50
6230	SUPPLIES	\$11,000	\$60,970	\$22,100	\$10,940	\$7,710	\$1,100	\$4,250	\$8,150	\$2,000			\$12,900	\$450	\$141,570
6270	FOOD	\$250	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$250
6310	EDUCATION & TRAINING	\$6,109	\$9,600	\$1,500	\$1,950	\$6,355	\$1,950	\$7,560	\$2,900	\$0			\$1,900	\$0	\$39,824
6330	TRAVEL	\$1,972	\$2,100	\$890	\$1,440	\$35,874	\$6,080	\$23,874	\$804	\$162			\$380	\$0	\$73,576
6520	INSURANCE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6530	EXTERNAL DATA PROCESSING	\$0	\$2,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$2,000
6550	DRUGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6580	CLAIMS PAID	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6590	JUDGEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6610	AWARDS & PREMIUMS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
6620	DUES & SUBSCRIPTIONS	\$1,659	\$1,087	\$560	\$1,200	\$1,610	\$100	\$1,475	\$332	\$0			\$0	\$0	\$8,023
7810	DEBT RETIREMENT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
7820	INTEREST	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
	DIRECT MATERIALS AND SERVICES	\$34,400	\$165,577	\$248,478	\$24,680	\$58,899	\$11,730	\$39,659	\$156,086	\$68,854			\$63,100	\$8,050	\$879,513
7100	INDIRECT COSTS (at.0444 EX of CAP)	\$12,453	\$93,615	\$54,389	\$48,037	\$72,706	\$22,524	\$61,830	\$66,025	\$9,242			\$0	\$0	\$440,821
7150	TELEPHONE	\$4,265	\$6,020	\$10,853	\$14,158	\$10,690	\$4,085	\$9,054	\$18,200	\$2,113			\$4,974	\$2,005	\$86,417
7200	DATA PROC SERVICES	\$0	\$1,232,450	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$1,232,450
7300	MOTOR POOL SERVICES	\$1,229	\$80	\$0	\$0	\$1,200	\$12,000	\$21,600	\$500	\$0			\$0	\$0	\$36,609
7400	BLDG. MGT. SERVICES	\$16,431	\$28,266	\$70,106	\$63,085	\$13,570	\$17,274	\$45,354	\$91,695	\$8,462			\$19,861	\$8,609	\$382,713
7500	OTHER INT. SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$65,605	\$0			\$0	\$0	\$65,605
7560	DISTRIBUTION/POSTAGE	\$22,011	\$1,000	\$3,000	\$10,880	\$2,955	\$19,830	\$1,980	\$165,000	\$20,000			\$61,200	\$50	\$307,906
	INTERNAL SVC. REIMBURSEMENTS	\$56,389	\$1,361,431	\$138,349	\$136,160	\$101,121	\$75,713	\$139,818	\$407,025	\$39,817			\$86,035	\$10,664	\$2,552,521
	TOTAL MATERIAL/SERVICES	\$90,789	\$1,527,008	\$386,827	\$160,840	\$160,020	\$87,443	\$179,477	\$563,111	\$108,671			\$149,135	\$18,714	\$3,432,034
8100	LAND	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
8200	BUILDINGS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
8300	OTHER IMPROVEMENTS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	\$0
8400	EQUIPMENT	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500	\$0			\$11,000	\$500	\$70,200
	CAPITAL OUTLAY	\$0	\$46,200	\$11,000	\$0	\$0	\$0	\$0	\$1,500	\$0			\$11,000	\$500	\$70,200
	DIRECT BUDGET	\$218,284	\$805,010	\$1,026,281	\$863,839	\$1,422,878	\$396,577	\$1,163,813	\$1,021,918	\$169,668			\$314,995	\$88,722	\$7,491,985
	TOTAL BUDGET	\$292,933	\$2,248,251	\$1,290,371	\$1,129,952	\$1,710,222	\$529,817	\$1,454,397	\$1,554,572	\$217,403			\$456,759	\$111,865	\$10,996,541

MULTNOMAH COUNTY

EXPENDITURES FOR:	A VALUATION	B RECORDS ASSESSMENT	C BOARDS OF EQUALIZATION	D TAX COLLECTION & DISTRIBUTION	E CADASTRAL MAPPING	F DATA PROCESSING	G TOTAL
1. Personal Services *1	4,438,751	892,544	108,731	1,228,340		675,044	7,343,411
2. Materials & Services *1	573,300	385,937	108,509	1,089,534		1,524,828 A	3,682,107
3. Cost of Transportation *2 (Do Not Include in Materials & Services or Capital Outlay)	105,269	890	162	4,904		2,180	113,405
4. Capital Outlay (Do Not Include in Materials & Services)	0	11,000	0	3,000		46,200 *3	60,200 *4
5. TOTAL	5,117,320	1,290,371	217,403	2,325,778	0	2,248,251	11,199,123 *6

*1 Do Not Include Any Amount That Is Included in Capital Outlay.

*2 Specify The Method Used To Determine Cost Of Transportation:

The estimate of the actual cost of operating the vehicle for a 12 month period plus a depreciation allowance for the useful life of the vehicle.

The rate per mile used in the County with an estimate of miles driven.
 Rate per Mile _____ Est. of Miles _____

*3 Data Processing And Capital Outlay Includes Personal Services And Materials & Services For All New Data Processing Development And All Data Processing Equipmen

*4 Capital Outlay Is Limited To Either 6 Percent Of The Total Dollars Certified Or \$50,000, Whichever Is Greater.

5 Specify The Method Used To Determine Indirect Costs:

Percent Amount Approved By A Federal Granting Agency.
 _____ .0444% of _____ 11,138,923
 (INCLUDED IN TOTALS ABOVE)

5 Percent of Total Direct Expenditures Less Capital Outlay.

Total Indirect Costs _____

*6 Total Eligible For Grant _____ \$11,199,123

7 Total Expenditures Certified For Consideration In Grant
 (Total of 5 and 6) _____ \$11,199,123

A: \$0 Cost of System Project may need to be reflected in Capital (G.4) instead of Materials & Services. (F3)

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A & T ADMINISTRATION		PREPARED BY NITA LOMAX	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7565	2/10/94 BUD94AD.wk3
OBJECT DETAIL		CURRENT BUDGET 1993-94	BUDGET REQUEST 1994-95	NET DIFF	
5100 PERMANENT		132,634	142,116	9,482	
5200 TEMPORARY		2,274	2,274	0	
5300 OVERTIME		0	0	0	
5400 PREMIUM PAY		2,798	2,798	0	
5500 FRINGE		35,666	36,696	1,030	
DIRECT PERSONAL SERVICES		173,372	183,884	10,512	
5550 INS BENEFITS		15,866	18,259	2,393	
PERSONAL SERVICES		189,238	202,143	12,905	
6050 COUNTY SUPPLEMENTS				0	
6060 PASS THROUGH PAYMENTS				0	
6110 PROFESSIONAL SERVICES		7,160	7,160	0	
6120 PRINTING		5,000	5,000	0	
6130 UTILITIES				0	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS		0	0	0	
6180 REPAIRS & MAINTENANCE		1,000	1,000	0	
6190 MAINTENANCE CONTRACTS		0	250	250	
6200 POSTAGE (see 7560)		0	0	0	
6230 SUPPLIES		11,000	11,000	0	
6270 FOOD		250	250	0	
6310 EDUCATION & TRAINING		12,148	6,109	(6,039)	
6330 TRAVEL		1,972	1,972	0	
6520 INSURANCE				0	
6530 EXTERNAL DATA PROCESSING		0	0	0	
6550 DRUGS				0	
6580 CLAIMS PAID				0	
6590 JUDGEMENTS				0	
6610 AWARDS & PREMIUMS				0	
6620 DUES & SUBSCRIPTIONS		1,659	1,659	0	
7810 DEBT RETIREMENT				0	
7820 INTEREST				0	
DIRECT MATERIALS AND SERVICES		40,189	34,400	(5,789)	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		9,422	12,453	3,031	
7150 TELEPHONE		3,639	4,265	626	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		1,229	1,229	0	
7400 BLDG. MGT. SERVICES		14837	16431	1,594	
7500 OTHER INT. SERVICES		0	0	0	
7560 DISTRIBUTION/POSTAGE		16,426	22,011	5,585	
INTERNAL SVC. REIMBURSEMENTS		45,553	56,389	10,836	
TOTAL MATERIAL/SERVICES		85,742	90,789	5,047	
8100 LAND				0	
8200 BUILDINGS				0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		0	0	0	
CAPITAL OUTLAY		0	0	0	
	DIRECT BUDGET	213,561	218,284	4,723	
	TOTAL BUDGET	274,980	292,933	17,952	

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL	ORGANIZATION NAME			DATE PREPARED	
	A & T Administration			01-10-94	
LGFS CODES	FUND	AGENCY	ORG	PREPARED BY	
	175	30	7565	CAL SMITH	

TEMPORARY EMPLOYEES	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
Explanation (Description, Job Class, etc.)					
Vacation coverage Temporary Worker 200 hours at 11.37	200	11.37	2,274	188	49
TOTALS (TRANSFER TO BUD 2)			2,274	188	49

OVERTIME PAY	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
Explanation (Description, Job Class, etc.)					
TOTALS (TRANSFER TO BUD 2)					
			0	0	0

PREMIUM PAY	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
Explanation (Description, Job Class, etc.)					
Vacation coverage Out of Class Pay 200 hours at 13.99	200	13.99	2,798	724	91
			2,798	724	91

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BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T ADMINISTRATION			PREPARED BY NITA LOMAX	
		FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7565	2/10/94	
OBJECT CODE	EXPLANATION				AMOUNT	
5100	PERMANENT				142,116	
5200	TEMPORARY : Est 200 hours Temporary Worker for vacation coverage @\$11.37/hour =				2,274	
5300	OVERTIME				0	
5400	PREMIUM PAY : Est 200 hours out of class pay during vacation relief @\$13.99/hour =				2,798	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T ADMINISTRATION	PREPARED BY NITA LOMAX		
OBJECT CODE	EXPLANATION	FUND 175	AGENCY 030	ORGANIZATION 7565	DATE 1/5/94
6110	PROFESSIONAL SERVICES (Includes \$300/year to monitor Computer Room Alarm System)				\$7,160
6120	PRINTING AND REPRODUCTION				\$5,000
6140	COMMUNICATIONS				\$0
6170	RENTAL EQUIPMENT				\$0
6180	REPAIRS & MAINTENANCE				\$1,000
6190	MAINTENANCE CONTRACTS - Pacific Automation One Fax (Murata F-37)				\$250
6200	POSTAGE (see 7560)				\$0
6230	SUPPLIES				\$11,000
6270	FOOD (A)				\$250

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T ADMINISTRATION			PREPARED BY NITA LOMAX	
		FUND	AGENCY	ORGANIZATION	DATE	
OBJECT CODE	EXPLANATION	175	030	7565	1/5/94	
6310	<p>EDUCATION & TRAINING</p> <p>Assessor's Mid-- Winter Conference (1 person @\$450/ea)</p> <p>Assessor's Summer Conference</p> <p>Institute Course</p> <p>DOR Technical Training (1 people @\$300/ea)</p> <p>General Professional Development Courses</p> <p>Supervisory Development Courses</p> <p>CPR & First Aid (6 people @\$35/ea)</p> <p>Legislative Session Update (2 people @\$50.00/ea)</p>			ITEM TOT.	<p>450</p> <p>400</p> <p>399</p> <p>300</p> <p>1,000</p> <p>3,250</p> <p>210</p> <p>100</p> <p>6,109</p>	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T ADMINISTRATION			PREPARED BY NITA LOMAX	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	AMOUNT
		175	030	7565	1/5/94	
6330	LOCAL TRAVEL AND MILEAGE Tri-Met Bus Passes (1) @\$21.00/month x 12 months Mileage				ITEM TOT. 252 1,720	\$1,972
6530	EXTERNAL DATA PROCESSING					\$0
6620	DUES AND SUBSCRIPTIONS (Office of Administration)					\$1,659

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T ADMINISTRATION	PREPARED BY NITA LOMAX
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION	DATE
		175 030 7565	1/10/94
7150	TELEPHONE		\$4,265
	(2) Voice Mail @\$51./ea = \$102.00		\$102
	(4) Multi Line Phones @\$220./ea = \$880.		\$880
	(1) 2500 Phone @\$124./ea = \$124.		\$124
	(1) Speaker Phone @\$165/ea = \$165		\$165
	(1) DID Line, x3280 FAX @\$320/ea		\$320
	(1) DID Line, x3090 @\$320/ea		\$320
	(3) DID Lines, x3323 @\$320/ea		\$320
	(4) DID Lines, x3345 @\$320/ea		\$320
	(1) DN Line, x2323 @\$172/ea		\$172
	(1) DN Line, x2324 @\$172/ea		\$172
	(1) DN Line, x2345 @\$172/ea		\$172
	(2) Other Access Lines @\$53/ea = \$106		\$106
	Customer Service Orders = \$800		\$800
	(4) Multnomah County Directories @\$4/ea = \$16		\$16
	Long Distance Charges @\$23/month x 12 months = \$276		\$276
7200	DATA PROCESSING SERVICES		
7300	MOTOR POOL SERVICES		\$1,229
7400	BLDG. MGT. SERVICES		\$16,431
7500	OTHER INTERNAL SERVICES		\$0
7560	DISTRIBUTION/POSTAGE		\$22,011

Teah. Support

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A & T TECHNICAL SUPPORT		PREPARED BY JOHN RILES	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7566	02-02-94 BUD94TS.WK3
OBJECT DETAIL		CURRENT BUDGET 1993-94	REQUEST 1994-95	NET DIFF	
5100 PERMANENT		334,257	435,861	101,604	
5200 TEMPORARY		12,428	27,050	14,622	
5300 OVERTIME		2,126	7,500	5,374	
5400 PREMIUM PAY		4,561	4,686	125	
5500 FRINGE		92,862	118,136	25,274	
DIRECT PERSONAL SERVICES		446,234	593,233	146,999	
5550 INS BENEFITS		62,439	81,810	19,372	
PERSONAL SERVICES		508,673	675,044	166,371	
6050 COUNTY SUPPLEMENTS				0	
6060 PASS THROUGH PAYMENTS				0	
6110 PROFESSIONAL SERVICES		72,400	55,600	(16,800)	
6120 PRINTING			500	500	
6130 UTILITIES				0	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS				0	
6180 REPAIRS & MAINTENANCE		23,075	28,075	5,000	
6190 MAINTENANCE CONTRACTS		33,906	5,595	(28,311)	
6200 POSTAGE (See 7560)		0	50	50	
6230 SUPPLIES		81,302	60,970	(20,332)	
6270 FOOD				0	
6310 EDUCATION & TRAINING		16,135	9,600	(6,535)	
6330 TRAVEL		1,608	2,100	492	
6520 INSURANCE				0	
6530 EXTERNAL DATA PROCESSING		400	2,000	1,600	
6550 DRUGS				0	
6580 CLAIMS PAID				0	
6590 JUDGEMENTS				0	
6610 AWARDS & PREMIUMS				0	
6620 DUES & SUBSCRIPTIONS		619	1,087	468	
7810 DEBT RETIREMENT				0	
7820 INTEREST				0	
DIRECT MATERIALS AND SERVICES		229,445	165,577	(63,868)	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		64,423	93,615	29,192	
7150 TELEPHONE		5,892	6,020	128	
7200 DATA PROC SERVICES		1,087,325	1,232,450	145,125	
7300 MOTOR POOL SERVICES		80	80	0	
7400 BLDG. MGT. SERVICES		26,779	28,266	1,487	
7500 OTHER INT. SERVICES		0	0	0	
7560 DISTRIBUTION/POSTAGE		1,000	1,000	0	
INTERNAL SVC. REIMBURSEMENTS		1,185,499	1,361,431	175,932	
TOTAL MATERIAL/SERVICES		1,414,944	1,527,008	112,064	
8100 LAND				0	
8200 BUILDINGS				0	
8300 OTHER IMPROVEMENTS				0	
8400 EQUIPMENT		46,200	46,200	0	
CAPITAL OUTLAY		46,200	46,200	0	
	DIRECT BUDGET	721,879	805,010	83,131	
	TOTAL BUDGET	1,969,817	2,248,251	278,434	

BUD 2 SUMMARY

		ORGANIZATION A & T TECHNICAL SUPPORT		DATE 02-02-94
		FUND 175	AGENCY 030	ORGANIZATION 7566
		PREPARED BY JOHN RILES		
FTE	JOB TITLE	JOB NO.	BASE	
5.0	DATA ENTRY OPERATOR	6007	116,535	
1.0	DATA ANALYST	6073	34,149	
1.0	OFFICE ASSISTANT/SENIOR	6002	27,104	
3.0	DATA ANALYST / SENIOR	9747	140,024	
1.0	INFO. RESOURCES MANAGER	9375	55,576	
1.0	OPERATIONS SUPERVISOR	9025	38,440	
1.0	OFFICE ASSISTANT II	6001	24,033	
13		TOTAL	435,861	

BUD 2

PERSONNEL DETAIL			ORGANIZATION A & T TECHNICAL SUPPORT				DATE 02-02-94	
			FUND 175	AGENCY 030	ORGANIZATION 7566	PREPARED BY JOHN RILES		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	DATA ENTRY OPERATOR	6007	WALKER, PATRICA H	22,248	5,755	2,969	30,972	
1.0	DATA ENTRY OPERATOR	6007	KIM, SOONGHEE	23,692	6,129	3,031	32,852	
1.0	DATA ENTRY OPERATOR	6007	WILLIAMS, SHERLYN	21,673	5,606	6,872	34,151	
1.0	DATA ENTRY OPERATOR	6007	KNIFKE, KIM G.	24,785	6,411	3,406	34,602	
1.0	DATA ENTRY OPERATOR	6007	TIMO, CORA	24,137	6,244	6,978	37,359	
1.0	OFFICE ASSISTANT II	6001	ALVAREZ, LESSIE	24,033	6,217	5,653	35,903	
1.0	OFFICE ASSISTANT/SENIOR	6002	RABJOHN, DARLENE R.	27,104	7,011	7,478	41,593	
1.0	OPERATIONS SUPERVISOR	9025	HELMER, KAREN	38,440	9,944	6,397	54,781	
1.0	DATA ANALYST, SENIOR	9747	GEORGE, JERRY	46,917	12,136	7,873	66,926	
1.0	DATA ANALYST, SENIOR	9747	HOLLAND, DARRYL	46,190	11,948	6,765	64,903	
1.0	INFO. RESOURCES MGR.	9375	RILES, JOHN	55,576	14,376	8,903	78,855	
1.0	DATA ANALYST	6073	FUNK, LAURIE	34,149	8,834	6,769	49,752	
1.0	DATA ANALYST, SENIOR	9747	BOGUCKI, DAVID	46,917	12,136	7,742	66,796	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					435,861	112,747	80,836	629,444
				TEMPORARY	5200			
					27,050	2,236	579	29,865
				OVERTIME	5300			
					7,500	1,940	243	9,683
				PREMIUM	5400			
					4,686	1,212	152	6,051
TOTAL				475,097	5500	5550	675,044	
					118,136	81,810		

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME			DATE PREPARED	
	A & T Technical Support			02/01/94	
	FUND	AGENCY	ORG	PREPARED BY	
	175	30	7566	JOHN RILES	

TEMPORARY EMPLOYEES					
Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
Temporary Data Analyst to provide system support while new system project & data entry system project are diverting A&T tech support resources	647	20.55	13,296	1,099	285
Seasonal temporary Data Analyst to provide support to sales ratio study	880	15.63	13,754	1,137	294
TOTALS (TRANSFER TO BUD 2)			27,050	2,236	579

OVERTIME PAY					
Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
Data Entry Operators(6) and Senior Office Assistant (1) use overtime to meet the peak workload demand during August and September to enter property values and property recordings	400	18.75	7,500	1,940	243
TOTALS (TRANSFER TO BUD 2)			7,500	1,940	243

PREMIUM PAY					
Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
Pay equity for Data Entry Operators Per local 88 Contract & work out of class	15,620	0.30	4,686	1,212	152
TOTALS (TRANSFER TO BUD 2)			4,686	1,212	152

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BUD 3

OBJECT DETAIL	ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES
	FUND 175	AGENCY 030	ORGANIZATION 7566	DATE 02-02-94

OBJECT CODE	EXPLANATION	AMOUNT
5100	PERMANENT	435,861
5200	TEMPORARY	27,050
5300	OVERTIME	7,500
5400	PREMIUM PAY	4,686
	o Pay Eq ity	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES		
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE		
		175	030	7566	1-24-94		
6110	PROFESSIONAL SERVICES						55,600
	o Data Entry Temporary Services (\$14.85/hr. X 3,500 hrs.)					\$52,000	
	o Windows Implementation Consulting (40hrs. X \$90/hr.)					\$3,600	
6120	PRINTING						500
6170	RENTALS						
6180	REPAIRS & MAINTENANCE						28,075
	o PC Repairs and Maintenance (\$250 /PC X 80 PC's -- including printers)					\$20,000	
	o MACINTOSH Repairs and Maintenance -- including printers (\$725 X 3)					\$2,175	
	o Line Installations					\$900	
	o XL-40 repairs					\$5,000	
6190	MAINTENANCE CONTRACTS						5,595
	o Novell netware					\$3,800	
	o COBOL & Realia Screen IO maintenance (Remittance Processor Software) (NCR)					\$350	
	o Key Entry III Customer Support (\$85/copy X 17 copies)					\$1,445	
6200	POSTAGE (see 7560)						50
6230	SUPPLIES (This Page: 53,120 Plus Next Pg: 7,850)						60,970
	o Furniture				QTY.	EACH	ITEM TOT.
	Four drawer Filing Cabinet				1	\$175	\$175
	Bookcase				1	\$170	\$170
	o Software						
	Key Entry III Software				2	\$595	\$1,190
	DaVinci E-mail Upgrade				1	\$1,000	\$1,000
	CaLANdar				20	\$55	\$1,095
	WordPerfect				70	\$100	\$7,000
	LOTUS 1-2-3				30	\$100	\$3,000
	PC Tools				70	\$70	\$4,900
	Microsoft Windows Upgrade				70	\$100	\$7,000
	Attachmate for Windows				50	\$275	\$13,750
	Software Upgrades				20	\$100	\$2,000
	o Miscellaneous Office & PC Supplies						
	Laser Printer Toner Cartridges				8	\$125	\$1,000
	Network LAN Board				8	\$425	\$3,400
	Network Cable & Connections				8	\$105	\$840
	Miscellaneous Office Supplies						\$4,000
	Network SCSI & EISA Boards				2	\$1,300	\$2,600

BUD 3

OBJECT DETAIL	ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES
	FUND 175	AGENCY 030	ORGANIZATION 7566	DATE 1-24-94

OBJECT CODE	EXPLANATION	QTY	COST	ITEM TOT.	AMOUNT
6230	SUPPLIES				
	o Computer Terminals	3	\$900	\$2,700	
	o Computer Printers	1	\$950	\$950	
	o Receipt printer for Cash Register System	1	\$600	\$600	
	o PC Communication Boards				
	Valuation	4	\$450	\$1,800	
	Tax Collection	1	\$450	\$450	
	Records Management	1	\$450	\$450	
	Technical Support	2	\$450	\$900	
	TOTAL THIS PAGE ONLY			\$7,850	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES	
		FUND 175	AGENCY 030	ORGANIZATION 7566	DATE 1-24-94	
OBJECT CODE						AMOUNT
6310	EDUCATION AND TRAINING					9,600
	ITEM TOT.					
	Appraisal Training (for Sales Ratio Analyst) (DOR SPONSORED CLASSES)					\$200
	System Training					
	(\$900/course X 2 people)					\$1,800
	(\$150/day X 20 days)					\$3,000
	(P.C. Skills for A & T users)					\$3,000
	D.P. Managers' Summer Conference (\$400 X 2 people)					\$800
	D.P. Managers' / Assessors'/Tax Collectors' Mid-Winter Conference (\$400 person X 2 people)					\$800

FILENAME

BUD94TS.WK3

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	AMOUNT
		175	030	7566	1-24-94	
6330	LOCAL TRAVEL AND MILEAGE				ITEM TOT.	2,100
	Tri - Met Bus Passes 5 300				\$1,500	
	Mileage				\$600	
6530	EXTERNAL DATA PROCESSING					2,000
	CompuServe				\$800	
	OLIS (Oregon Online Legislative Retrieval Information System)				\$1,200	
6620	DUES AND SUBSCRIPTIONS					1,087
	MACWorld				\$24	
	Netware Advisor				\$95	
	Computer World				\$30	
	PC Magazine				\$35	
	Word Perfect				\$24	
	CompuServe				\$29	
	Legislative Counsel - Publication V.6--Revenue & Taxation				\$90	
	CNE Association				\$150	
	Library of Computer & Information Sciences & Other Books				\$250	
	Data Base Advisor (with disk subscription)				\$125	
	Board of Realtors Affiliate Membership				235	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7566	1-24-94	
7150	TELEPHONE					6,020
				QTY.	EA.	ITEM TOT.
	Pagers (2)			2	\$193	\$386
	2500			12	\$120	\$1,440
	Speaker Phone			1	\$160	\$160
	Long Distance			1	\$1,200	\$1,200
	Service			1	\$100	\$100
	Directories			10	\$4	\$40
	DID			3	\$310	\$930
	DN			9	\$166	\$1,494
	Voice Mail Service			5	\$54	\$270
7200	DATA PROCESSING SERVICES					1,232,450
7300	MOTOR POOL SERVICES					80
7400	RENTALS					28,266
	o Facility Rental at 610 SW Alder St.					
7560	DISTRIBUTION/POSTAGE					1,000

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T TECHNICAL SUPPORT			PREPARED BY JOHN RILES		
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	AMOUNT	
8400	EQUIPMENT	175	030	7566	1-24-94	46,200	
	o Personal Computers						
	Valuation				QTY	COST	ITEM TOT.
	Tax Collection				5	\$1,900	\$9,500
	Records Management				2	\$1,900	\$3,800
	Technical Support				1	\$1,900	\$1,900
					0	\$1,900	\$0
	o Personal Printers						
	Tax Collection - Laserjet 4Si (+ memory, duplex, fonts)				1	\$4,100	\$4,100
	Tax Collection - Laserjet 4 (+ memory, & comm. board)				1	\$1,700	\$1,700
	o OCR reader for Cash Register System Station				1	\$1,200	\$1,200
	o A&T Mainframe System Project--Equipment						\$24,000
	Information Engr. Workbench software, PC equipment,						
	Adhoc reporting software						

Records Mgmt

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A & T RECORDS MANAGEMENT		PREPARED BY JAMES CZMOWSKI	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7570	2/1/94
OBJECT DETAIL		CURRENT BUDGET 1993-94	1994-95 REQUEST	DIFF	BUD94RM.WK3
5100 PERMANENT		589,024	615,352	26,328	
5200 TEMPORARY		6,420	3,025	(3,395)	
5300 OVERTIME		0	0	0	
5400 PREMIUM PAY		0	0	0	
5500 FRINGE		159,206	159,426	220	
DIRECT PERSONAL SERVICES		754,651	777,803	23,153	
5550 INS BENEFITS		109,853	114,741	4,888	
PERSONAL SERVICES		864,504	892,544	28,041	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES		139,200	139,200	0	
6120 PRINTING		13,200	13,600	400	
6130 UTILITIES		0	0	0	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS		16,078	16,378	300	
6180 REPAIRS & MAINTENANCE		8,000	7,000	(1,000)	
6190 MAINTENANCE CONTRACTS		46,900	47,250	350	
6200 POSTAGE (SEE 7560)		0	0	0	
6230 SUPPLIES		22,100	22,100	0	
6270 FOOD		0	0	0	
6310 EDUCATION & TRAINING		2,100	1,500	(600)	
6330 TRAVEL		1,106	890	(216)	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		1,000		(1,000)	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		560	560	0	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		250,244	248,478	(1,766)	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		41,925	54,389	12,464	
7150 TELEPHONE		10,369	10,853	484	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		0	0	0	
7400 BLDG. MGT. SERVICES		62,927	70,106	7,179	
7500 OTHER INT. SERVICES		0	0	0	
7560 DISTRIBUTION/POSTAGE		3,000	3,000	0	
INTERNAL SVC. REIMBURSEMENTS		118,221	138,349	20,128	
TOTAL MATERIAL/SERVICES		368,465	386,827	18,362	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		11,500	11,000	(500)	
CAPITAL OUTLAY		11,500	11,000	(500)	
DIRECT BUDGET		1,004,895	1,026,281	21,387	
TOTAL BUDGET		1,244,469	1,290,371	45,902	

BUD 2 SUMMARY

		ORGANIZATION A & T RECORDS MANAGEMENT		DATE 2/1/94	
		FUND 175	AGENCY 030	ORGANIZATION 7570	PREPARED BY JAMES CZMOWSKI
FTE	JOB TITLE			JOB NO.	BASE
9.0	OFFICE ASSISTANT 2			6001	206,970
4.0	Office Assistant/Seni			6002	110,267
1.0	Clerical Unit Supervi			6003	30,673
4.0	Cartographer			6082	132,383
1.0	Operations Supervisor			9025	36,039
1.0	Cartographer Supervisor			9145	41,050
1.0	Geographic/Info/Records MGR			9320	57,970
21				TOTAL	615,352

BUD 2

PERSONNEL DETAIL			ORGANIZATION A & T RECORDS MANAGEMENT				DATE 2/1/94	
			FUND 175	AGENCY 030	ORGANIZATION 7570	PREPARED BY JAMES CZMOWSKI		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	OFFICE ASSISTANT 2	6001	Armstrachan, Lauren	24,033	6,217	6,973	37,223	
1.0	Office Assistant 2	6001	Abellera,Rudolfo	21,099	5,458	3,248	29,805	
1.0	Office Assistant 2	6001	Pierce, Kimberly	21,673	5,606	6,741	34,020	
1.0	Office Assistant 2	6001	Glenn, Susan	23,476	6,073	7,321	36,870	
1.0	Office Assistant 2	6001	Pfau, Mary	24,033	6,217	3,045	33,295	
1.0	Office Assistant 2	6001	Rutledge, Teresa	24,033	6,217	6,335	36,585	
1.0	Office Assistant 2	6001	Sadler,Joanne	24,033	6,217	6,095	36,345	
1.0	Office Assistant 2	6001	Tillman, Jeannine	24,033	6,217	4,981	35,231	
1.0	Office Assistant/Seni	6002	Colton, Gayle J.	27,812	7,194	3,199	38,205	
1.0	Office Assistant/Seni	6002	Salvadore, Phyllis	27,812	7,194	5,143	40,149	
1.0	Office Assistant/Seni	6002	Beebe, Kunie	26,831	6,941	5,773	39,545	
1.0	Office Assistant/Seni	6002	Worland, Beverly K.	27,812	7,194	7,507	42,513	
1.0	Clerical Unit Supervi	6003	Vielhauer, Joan	30,673	7,934	3,321	41,928	
1.0	Cartographer	6082	Benson, Barry R.	34,744	8,987	7,432	51,163	
1.0	Cartographer	6082	Berg, Lillian A.	34,396	8,897	3,481	46,774	
1.0	Cartographer	6082	Mills,Richard B.	28,498	7,372	7,164	43,034	
1.0	Cartographer	6082	Nichols, Carol S.	34,744	8,987	3,504	47,235	
1.0	Office Assistant 2	6001	Winkley, Colleen	20,558	5,318	2,897	28,773	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
				TEMPORARY	5200			
				OVERTIME	5300			
					0			
				PREMIUM	5400			
					0			
TOTAL								

SEE NEXT PAGE FOR ORG. TOTAL

BUD 2

PERSONNEL DETAIL			ORGANIZATION A & T RECORDS MANAGEMENT				DATE 2/1/94	
			FUND 175	AGENCY 030	ORGANIZATION 7570	PREPARED BY JAMES CZMOWSKI		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	Operations Supervisor	9025	Wilding, Maren H.	36,039	9,322	4,004	49,365	
1.0	Cartographer Supervisor	9145	Stoddard, Janice L.	41,050	10,619	7,463	59,132	
1.0	Geographic/Info/Records MGR	9320	Czmowski, James S.	57,970	14,995	9,016	81,981	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					615,352	159,176	114,643	889,171
				TEMPORARY	5200			
					3,025	250	98	3,373
				OVERTIME	5300			
					0			
				PREMIUM	5400			
	0	0		0				
TOTAL				618,377	159,426	114,741	892,544	

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME A & T Records Management			DATE PREPARED 02/01/94	
	FUND 100	AGENCY 30	ORG 7570	PREPARED BY James Czmowski	

TEMPORARY EMPLOYEES Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
Remapping & microfilming projects. OA11 work 330 hours at 9.16	330	9.16	3,025	250	98
TOTALS (TRANSFER TO BUD 2)			3,025	250	98

OVERTIME PAY Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

PREMIUM PAY Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

2a7570

BUD 3

		ORGANIZATION NAME	PREPARED BY
		A & T RECORDS MANAGEMENT	JAMES CZMOWSKI
		FUND AGENCY ORGANIZATION	DATE
		175 030 7570	1/4/94
OBJECT CODE	EXPLANATION	AMOUNT	
6110	PROFESSIONAL SERVICES Eighth year of ten year re-mapping contract W/Oregon DOR W/Oregon DOR.	\$139,200	
6120	PRINTING AND REPRODUCTION	\$13,600	
	A) Microfiche up-dates of City of Portland water and sewer maps.	\$5,200	
	B) Copies of permits from City of Portland	\$2,400	
	C) Forms (Tax lot cards, envelopes, etc.)	\$6,000	
6170	RENTALS	\$16,378	
	A) Four copy machines for Appraisal, Administration Record Management, and Residential Appraisal.	\$13,740	
	B) One copy machine for Appraisal Clerical	\$1,618	
	C) One copy machine for Tax Lot Cards and a coin device for Pubic machine	\$1,020	
6180	REPAIRS & MAINTENANCE	\$7,000	
	A) Microfiche equipment repairs	\$2,000	
	B) Microfilm equipment repairs	\$2,000	
	C) Personal computer, etc. repairs	\$3,000	
6190	MAINTENANCE CONTRACTS	\$47,250	
	A) All of the Divisions Microfiche reader/printers One contract for thirteen units	\$6,250	
	B) Xerox 2510 copier	\$1,000	
	C) Intergraph Computer System	\$40,000	
6200	POSTAGE (see 7560)	\$0	
6230	SUPPLIES	\$22,100	
	A) Paper for microfilm and microfiche printers	\$1,500	
	B) Xerographic paper and toner	\$6,100	
	C) City and County directories	\$400	
	D) Paper for computer printers	\$4,000	
	E) Drafting supplies such as ink, electric eraser's, pen points tape, new white board (conference room), etc.	\$10,100	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDS MANAGEMENT			PREPARED BY JAMES CZMOWSKI	
		FUND 175	AGENCY 030	ORGANIZATION 7570	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6310	EDUCATION & TRAINING				\$1,500	
	A) Assessor's Mid-Winter Conference Two people from records & cartography sections					
B) Tuition Reimbursement				\$600		

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDS MANAGEMENT			PREPARED BY JAMES CZMOWSKI	
		FUND 175	AGENCY 030	ORGANIZATION 7570	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6330	LOCAL TRAVEL AND MILEAGE Tri-Met Bus Passes 3 @ \$180 Mileage (local trips, Salem, etc.) \$350.				ITEM TOT. \$540 \$350	\$890
6530	EXTERNAL DATA PROCESSING					
6620	DUES & SUBSCRIPTIONS A)National Info Data Center (1 Zip Code Directory) \$25 B) Intergraph NW Local User Group \$20 C) Urban & Regional Info Systems Assoc. \$85 D) Legislative Counsel (Pub (1 set ORS#10035/91)) \$275 E) Cole Directories \$155					\$560

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDS MANAGEMENT		PREPARED BY JAMES CZMOWSKI	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE
		175	030	7570	1/10/94
OBJECT CODE	EXPLANATION	QTY.	EA.	ITEM TOT.	AMOUNT
7150	TELEPHONE				\$10,853
	Voice Mail	4	\$51	\$204	
	Multi Line	6	\$220	\$1,320	
	2500	17	\$124	\$2,108	
	Speaker Phone	1	\$165	\$165	
	Long Distance	1	\$1,000	\$1,000	
	Service	1	\$412	\$412	
	Directories	22	\$4	\$88	
	DID No. 3258,3375,3376,3221,5122	5	\$320	\$1,600	
	DN No. 2771,2715,2780,6822,2772, No. 2770,6185,6184,2778,6183, No. 2549,2773,2210,6738,6582 No. 2001,6996,6728,6583,6635, No. 6663,2512,2664	23	\$172	\$3,956	
7200	DATA PROCESSING SERVICES				
7300	MOTOR POOL SERVICES				
7400	BUILDING MGT. SERVICES			Record Management building space lease.	\$70,106
7500	OTHER INTERNAL SERVICES				
7560	DISTRIBUTION/POSTAGE				\$3,000

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDS MANAGEMENT	PREPARED BY JAMES CZMOWSKI
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION 175 030 7570	DATE 1/4/94
8300	OTHER IMPROVEMENTS		
8400	EQUIPMENT ONE MICROFILM READER/PRINTER (FOR DOING OWNERSHIP RESEARCH)		\$11,000

Appraisal

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A&T APPRAISAL SUPPORT/EXEMPTION		PREPARED BY ROBERT ELLIS	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7620 & 7585	02/01/94 BUD94APS.wk3
OBJECT DETAIL		CURRENT BUDGET 1993-94	1994-95 REQUEST		DIFF
5100 PERMANENT		724,504	636,168		(88,336)
5200 TEMPORARY		35,856	35,856		0
5300 OVERTIME		0	0		0
5400 PREMIUM PAY		0	0		0
5500 FRINGE		198,101	167,135		(30,966)
DIRECT PERSONAL SERVICES		958,461	839,159		(119,302)
5550 INS BENEFITS		134,341	129,953		(4,388)
PERSONAL SERVICES		1,092,802	969,112		(123,690)
6050 COUNTY SUPPLEMENTS					0
6060 PASS THROUGH PAYMENTS					0
6110 PROFESSIONAL SERVICES		0	1,400		1,400
6120 PRINTING		6,051	5,500		(551)
6130 UTILITIES					0
6140 COMMUNICATIONS		500	0		(500)
6170 RENTALS		0	0		0
6180 REPAIRS & MAINTENANCE		2,048	2,000		(48)
6190 MAINTENANCE CONTRACTS		0	250		250
6200 POSTAGE (See 7560)		0	0		0
6230 SUPPLIES		7,172	10,940		3,768
6270 FOOD					0
62710 EDUCATION & TRAINING		6,230	1,950		(4,280)
6330 TRAVEL		3,127	1,440		(1,687)
6520 INSURANCE					0
6530 EXTERNAL DATA PROCESSING					0
6550 DRUGS					0
6580 CLAIMS PAID					0
6590 JUDGEMENTS					0
6610 AWARDS & PREMIUMS					0
6620 DUES & SUBSCRIPTIONS		129	1,200		1,071
7810 DEBT RETIREMENT					0
7820 INTEREST					0
DIRECT MATERIALS AND SERVICES		25,257	24,680		(577)
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		42,173	48,037		5,864
7150 TELEPHONE		13,213	14,158		945
7200 DATA PROC SERVICES					0
7300 MOTOR POOL SERVICES		2,046	0		(2,046)
7400 BLDG. MGT. SERVICES		44467	63085		18,618
7500 OTHER INT. SERVICES					0
7560 DISTRIBUTION/POSTAGE		20,300	10,880		(9,420)
INTERNAL SVC. REIMBURSEMENTS		122,199	136,160		13,961
TOTAL MATERIAL/SERVICES		147,456	160,840		13,384
8100 LAND					0
8200 BUILDINGS					0
8300 OTHER IMPROVEMENTS					0
8400 EQUIPMENT					0
CAPITAL OUTLAY		0	0		0
	DIRECT BUDGET	983,718	863,839		(119,879)
	TOTAL BUDGET	1,240,258	1,129,952		(110,306)

BUD 2		ORGANIZATION APPRAISAL SUPPORT/EXEMPTION		DATE 02/01/94
	FUND 175	AGENCY 030	ORGANIZATION 7620 & 7585	PREPARED BY ROBERT ELLIS
FTE	JOB TITLE	JOB NO.	BASE	
12.0	OFFICE ASSISTANT 2	6001	272,814	
4.0	OFFICE ASSISTANT/SENIOR	6002	108,979	
1.0	CLERICAL UNIT SUPERVISOR	6003	30,673	
3.0	WORD PROCESSING OPERATOR	6004	71,103	
0.0	APPRAISAL SPECIALIST	6029	0	
0.0	FISCAL SPECIALIST 2	6030	0	
0.0	PROPERTY APPRAISER/RES	6042	0	
1.0	TAX EXEMPTION SPECIALIST	6045	40,486	
0.0	PROPERTY APPRAISER/COMM	6049	0	
0.0	PROPERTY APPRAISER/PP	6050	0	
0.0	DATA ANALYST	6073	0	
0.0	APPRAISAL SUPERVISOR/COM/RES/PERS	9145	0	
1.0	OPERATIONS ADMINISTRATOR	9155	45,212	
0.0	CHIEF APPRAISER/RES/COM	9320	0	
0.0	SENIOR DATA ANALYST	9330	0	
1.0	VALUATION MANAGER	9420	66,900	
23.0		TOTAL	636,168	

BUD2		PERSONNEL	ORGANIZATION				DATE	
DETAIL		A & T APPRAISAL				02/01/94		
		FUND	AGENCY	ORGANIZATION	PREPARED BY			
		175	030	7585	ROBERT ELLIS			
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
				DIR		IND		
0.0				0	0	0	0	
0.5	OFFICE ASSISTANT/SEN	6002	GASKA, LYNNE	13,906	3,597	6,917	24,420	
0.5	OFFICE ASSISTANT/SEN	6002	STEVENS, SHELLY A	13,906	3,597	2,826	20,329	
1.0	TAX EXEMPTION SPECIALIST	6045	SKINNER, STEVEN A	40,486	10,473	5,712	56,671	
0.0								
0.0								
1.0	VALUATION MANAGER	9420	ELLIS, ROBERT L	66,900	16,915	7,748	91,563	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					135,198	34,582	23,203	192,983
				TEMPORARY	5200			
					0	0	0	0
				OVERTIME	5300			
					0	0	0	0
				PREMIUM	5400			
	0	0	0	0				
TOTAL				135,198	5500	5550	192,983	
					34,582	23,203		

BUD2

PERSONNEL DETAIL			ORGANIZATION A & T APPRAISAL CLERICAL			DATE 02/01/94		
			FUND 175	AGENCY 040	ORGANIZATION 7620	PREPARED BY ROBERT ELLIS		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	OFFICE ASSISTANT 2	6001	ATTWOOD, DEBORAH P	24,033	6,217	7,345	37,595	
1.0	OFFICE ASSISTANT 2	6001	BAIN, DEBORAH L	24,033	6,217	6,842	37,092	
1.0	OFFICE ASSISTANT 2	6001	BONAR, PATSY A	24,033	6,217	5,653	35,903	
1.0	OFFICE ASSISTANT 2	6001	COOK, LEZLEE L	22,192	5,741	5,575	33,508	
1.0	OFFICE ASSISTANT 2	6001	HOOVER, WILLIAM	20,306	5,253	5,277	30,836	
1.0	OFFICE ASSISTANT 2	6001	THORNTON, NANCY	20,306	5,253	4,163	29,722	
1.0	OFFICE ASSISTANT 2	6001	ILG, HELEN DIANE	22,192	5,741	7,267	35,200	
1.0	OFFICE ASSISTANT 2	6001	HEADE, DIANE M	24,033	6,217	4,981	35,231	
1.0	OFFICE ASSISTANT 2	6001	SUMMER, CAROL	20,201	5,226	5,779	31,206	
1.0	OFFICE ASSISTANT 2	6001	MOORHEAD, SANDRA J	24,033	6,217	3,373	33,623	
1.0	OFFICE ASSISTANT 2	6001	STEELE, CELESTE M	24,033	6,217	3,373	33,623	
1.0	OFFICE ASSISTANT 2	6001	ZWASCHKA, CAROLYN KAY	23,420	6,058	6,947	36,425	
1.0	OFFICE ASSISSTANT/SEN	6002	CARTER, PATTI I	27,812	7,194	3,207	38,213	
1.0	OFFICE ASSISSTANT/SEN	6002	GOODWIN, KAREN L	25,543	6,607	5,719	37,869	
1.0	OFFICE ASSISSTANT/SEN	6002	STRIDER, LAURA L	27,812	7,194	3,535	38,541	
1.0	WORD PROCESSING OPERAT	6004	BERGERON, SUZANNE	22,404	5,795	5,584	33,783	
1.0	CLERICAL UNIT SUPERVIS	6003	FISHER, KAREN A	30,673	7,934	3,657	42,264	
1.0	WORD PROCESSING OPERAT	6004	PAOLLILI, CYNTHIA L	24,785	6,411	5,041	36,237	
1.0	WORD PROCESSING OPERAT	6004	POEHNER, LISA L	23,914	6,186	5,004	35,104	
1.0	OPERATIONS ADMINISTRATOR	9155	HOFF, SUSAN D	45,212	11,695	7,661	64,568	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					500,969	129,589	105,983	736,541
				TEMPORARY	5200			
					35,856	2,964	767	39,588
				OVERTIME	5300			
					0	0	0	0
				PREMIUM	5400			
					0	0	0	0
TOTAL					5500	5550		
				536,825	132,553	106,750	776,129	

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL	ORGANIZATION NAME			DATE PREPARED	
	A & T Appraisal Support			01-10-94	
LGFS CODES	FUND	AGENCY	ORG	PREPARED BY	
	175	30	7620	ROBERT ELLIS	

TEMPORARY EMPLOYEES					
Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
Part time help required in July, Aug, & Sept to process Personal Property statements.					
Eight OA1 for 12 weeks @ 7.26= 27878	3,840	7.26	27,878	2,305	597
Two OA11 for 12 weeks @ 8.31= 7978	960	8.31	7,978	660	171
TOTALS (TRANSFER TO BUD 2)			35,856	2,964	767

OVERTIME PAY					
Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

PREMIUM PAY					
Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

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BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL	PREPARED BY ROBERT ELLIS
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION	DATE
		175 040 7620	02/01/94
5100	PERMANENT		636,168
5200	TEMPORARY: PART TIME HELP REQUIRED IN JULY, AUG, AND SEPT TO PROCESS PERSONAL PROPERTY STATEMENTS 8 OA1 FOR 12 WEEKS @ 7.26/HR = 27,878 2 OA2 FOR 12 WEEKS @ 8.31/HR = 7,978		ORG.=7620 35,856
5400	PREMIUM PAY:		0

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL	PREPARED BY ROBERT ELLIS
		FUND 175	AGENCY 030
OBJECT CODE	EXPLANATION	AMOUNT	
6110	PROFESSIONAL SERVICES: RMLS COMPUTER ACCESS TO SALES LISTINGS	1400	
6120	PRINTING AND REPRODUCTN: CITY-COUNTY DUPLICATING AND PRINTING CHARGES INCLUDING FORMS, BUSINESS CARDS, ENVELOPES AND LETTERHEAD PAPER, including: PAPER FOR MICROFICHE READER-PRINTERS WAR VETERAN EXEMPTION FORMS CONTINOUS PAPER FOR COMPUTER PRINTERS, 30 BOXES DRY COPIER PAPER 8.5 X 11, 50 BOXES DRY COPIER PAPER 8.5 X 14, 15 BOXES DRY COPIER PAPER 11 X 17, 2 BOXES FAX PAPER 12 ROLLS	5500	
6140	COMMUNICATIONS:	\$0	
6180	REPAIRS & MAINTENANCE:	\$2,000	
6190	MAINTENANCE CONTRACTS: MURATA FAX MACHINES 1 @ 250	\$250	
6200	POSTAGE: See 7560		
6230	SUPPLIES: P.C. SOFTWARE OFFICE SUPPLIES: PENS, PENCILS, PAPER, BINDERS CALENDARS, ENVELOPES, PRINTER RIBBONS, LASER PRINT CARTRIDGES, MILEAGE REPORTS ETC PETTY CASH REIMBURSEMENTS PARTITIONS/DIVIDERS FOR WORD PROCESSING SECTION	\$1,350 \$6,990 \$100 \$2,500	
		\$10,940	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME APPRAISAL SUPPORT/EXEMPTION			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 030	ORGANIZATION 7620 & 7585	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6310	EDUCATION & TRAINING				ITEM TOT. 1,950	
	ASSESSORS ANNUAL CONFERENCE ONE PERSON (lodging, registration, per diem, mileage)				\$450	
	ASSESSORS MID-WINTER WORKSHOP ONE PERSON (lodging, registration, per diem, mileage)				\$400	
	EDUCATION REIMBURSEMENTS				\$400	
	ONE MANAGER ATTEND DOR MGMT PROGRAMS				\$250	
	APPRAISERS AND TECHS ATTEND TECHNICAL APPRAISAL COURSES				\$450	
	ONE EXEMPTION SPECIALIST				350	
	ONE MANAGER				100	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME			PREPARED BY	
		APPRAISAL SUPPORT/EXEMPTION			ROBERT ELLIS	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7620 & 7585	1/10/94	
OBJECT CODE	EXPLANATION				AMOUNT	
7150	TELEPHONE:				\$14,158	
		QTY.	EA.	ITEM TOT.		
	Multi-Line set	10	\$212	\$2,120		
	2500 & unity II sets	13	\$119	\$1,547		
	Speaker Phone	2	\$159	\$318		
	10-key add on	1	\$212	\$212		
	20-key add on	1	\$318	\$318		
	Other equipment access	1	53	\$53		
	Long Distance, TMS	1	\$500	\$500		
	Customer Service	1	\$2,600	\$2,600		
	Directories	25	\$4	\$100		
	DID-line, county network	5	\$320	\$1,600		
	DN-County network line	25	\$170	\$4,250		
	Voice Mail	2	51	\$102		
	Automated attendant	1	438	\$438		
7300	MOTOR POOL SERVICES:				\$0	
7400	BLDG. MGT. SERVICES :SPACE RENTAL				60,589	\$63,085
	PLUS SPACE RENTAL (TEMPORARY HELP - THREE MONTHS)				2496	
7560	POSTAGE:				\$10,880	
	VETERANS EXEMPTION FORMS	5000	@.29	\$1,450		
	GENERAL POSTAGE			\$4,500		
	MISC/CERTIFIED MAIL			\$850		
	MAIL CHARGE, FOLDING, STUFFING ETC.			\$600		
		12000	@.29	\$3,480		

BUD 1

BUDGET REQUEST	AGENCY DES	ORGANIZATION A&T RESIDENTIAL APPRAISAL		PREPARED BY ROBERT ELLIS	
	LGFS CODE	FUND	AGENCY	ORGANIZATION	DATE
		175	030	7610	2/1/94 BUD94APR.wk3
OBJECT DETAIL		CURRENT BUDGET 1993-94	1994-95 REQUEST		DIFF
5100 PERMANENT		1,024,103	1,083,661		59,558
5200 TEMPORARY		0	0		0
5300 OVERTIME		0	0		0
5400 PREMIUM PAY		0	0		0
5500 FRINGE		275,893	280,318		4,425
DIRECT PERSONAL SERVICES		1,299,996	1,363,979		63,983
5550 INS BENEFITS		172,304	186,223		13,919
PERSONAL SERVICES		1,472,300	1,550,202		77,902
6050 COUNTY SUPPLEMENTS					0
6060 PASS THROUGH PAYMENTS					0
6110 PROFESSIONAL SERVICES		2,400	2,400		0
6120 PRINTING		1,208	3,500		2,292
6130 UTILITIES					0
6140 COMMUNICATIONS		0	0		0
6170 RENTALS		0	0		0
6180 REPAIRS & MAINTENANCE		442	1,200		758
6190 MAINTENANCE CONTRACTS		500	250		(250)
6200 POSTAGE (See 7560)		0	0		0
6230 SUPPLIES		11,833	7,710		(4,123)
6270 FOOD					0
6310 EDUCATION & TRAINING		10,896	6,355		(4,541)
6330 TRAVEL		34,610	35,874		1,264
6520 INSURANCE					0
6530 EXTERNAL DATA PROCESSING					0
6550 DRUGS					0
6580 CLAIMS PAID					0
6590 JUDGEMENTS					0
6610 AWARDS & PREMIUMS					0
6620 DUES & SUBSCRIPTIONS		290	1,610		1,320
7810 DEBT RETIREMENT					0
7820 INTEREST					0
DIRECT MATERIALS AND SERVICES		62,179	58,899		(3,280)
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		54,300	72,706		18,406
7150 TELEPHONE		7,111	10,690		3,579
7200 DATA PROC SERVICES					0
7300 MOTOR POOL SERVICES		1,023	1,200		177
7400 BLDG. MGT. SERVICES		0	13570		13,570
7500 OTHER INT. SERVICES					0
7560 DISTRIBUTION/POSTAGE		0	2,955		2,955
INTERNAL SVC. REIMBURSEMENTS		62,434	101,121		38,687
TOTAL MATERIAL/SERVICES		124,613	160,020		35,407
8100 LAND					0
8200 BUILDINGS					0
8300 OTHER IMPROVEMENTS					0
8400 EQUIPMENT					0
CAPITAL OUTLAY		0	0		0
DIRECT BUDGET		1,362,175	1,422,878		60,703
TOTAL BUDGET		1,596,913	1,710,222		113,309

BUD 2		ORGANIZATION RESIDENTIAL APPRAISAL			DATE 2/1/94
		FUND	AGENCY	ORGANIZATION	PREPARED BY
		175	030	7610	ROBERT ELLIS
FTE	JOB TITLE			JOB NO.	BASE
0.0	OFFICE ASSISTANT 2			6001	0
0.0	OFFICE ASSISTANT/SENIOR			6002	0
0.0	CLERICAL UNIT SUPERVISOR			6003	0
0.0	WORD PROCESSING OPERATOR			6004	0
0.0	APPRAISAL SPECIALIST			6029	0
0.0	FISCAL SPECIALIST 2			6030	0
23.0	PROPERTY APPRAISER/RES			6042	850,084
0.0	TAX EXEMPTION SPECIALIST			6045	0
0.0	PROPERTY APPRAISER/COMM			6049	0
0.0	PROPERTY APPRAISER/PP			6050	0
0.0	DATA ANALYST			6073	0
4.0	APPRAISAL SUPERVISOR/COM/RES/PERS			9145	176,554
0.0	OPERATIONS ADMINISTRATOR			9155	0
1.0	CHIEF APPRAISER/RES/COM			9320	57,023
0.0	SENIOR DATA ANALYST			9330	0
0.0	VALUATION MANAGER			9420	0
28.0				TOTAL	1,083,661

BUD2

PERSONNEL DETAIL			ORGANIZATION A & T APPRAISAL RESIDENTIAL				DATE 2/1/94	
			FUND 175	AGENCY 040	ORGANIZATION 7610	PREPARED BY ROBERT ELLIS		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	PROPERTY APPRAISER	6042	ALCANTARA, JOSEPH R	38,148	9,868	7,950	55,966	
1.0	PROPERTY APPRAISER	6042	BAILEY, CATHERINE C	37,340	9,659	7,412	54,411	
1.0	PROPERTY APPRAISER	6042	BECK, DELBERTA	38,148	9,868	5,613	53,629	
1.0	PROPERTY APPRAISER	6042	BLIXT, STEVEN S	38,148	9,868	3,650	51,666	
1.0	PROPERTY APPRAISER	6042	CARLSON, VERA L	38,148	9,868	7,578	55,594	
1.0	PROPERTY APPRAISER	6042	CECH, LESLIE M	37,845	9,790	7,937	55,572	
1.0	PROPERTY APPRAISER	6042	COLLMER, KENNETH S	36,032	9,321	7,859	53,212	
1.0	PROPERTY APPRAISER	6042	CRAFT, JAMES E	37,340	9,659	5,551	52,550	
1.0	PROPERTY APPRAISER	6042	HAMM, KURTIS	35,207	9,107	5,487	49,801	
1.0	PROPERTY APPRAISER	6042	DURST, BECKY L	38,148	9,868	7,578	55,594	
1.0	PROPERTY APPRAISER	6042	FAST, M BETH	35,722	9,240	7,474	52,436	
1.0	PROPERTY APPRAISER	6042	HEINE, PAUL V	37,542	9,711	5,587	52,840	
1.0	PROPERTY APPRAISER	6042	BABCOCK, DAVID	32,728	8,466	3,074	44,268	
1.0	PROPERTY APPRAISER	6042	KELSAY, DOUG	38,148	9,868	7,950	55,966	
1.0	PROPERTY APPRAISER	6042	NAILLON, EDNA M	38,148	9,868	6,258	54,274	
1.0	PROPERTY APPRAISER	6042	O'DELL, WILBUR E	38,148	9,868	3,650	51,666	
1.0	PROPERTY APPRAISER	6042	SCHAFFER, ROBERT S	37,038	9,581	5,538	52,157	
1.0	PROPERTY APPRAISER	6042	SELLARS, JAMES R	38,148	9,868	3,978	51,994	
				0	0	0	0	
1.0	PROPERTY APPRAISER	6042	SHEETS, BRETT	34,692	8,974	7,801	51,467	
1.0	PROPERTY APPRAISER	6042	TROJAN, MICHAEL E	37,340	9,659	5,578	52,577	
1.0	PROPERTY APPRAISER	6042	UREN, LINDA S	38,148	9,868	7,950	55,966	
1.0	PROPERTY APPRAISER	6042	WARDWELL, DENNIS W	35,594	9,207	7,468	52,269	
1.0	PROPERTY APPRAISER	6042	THOMAS, GARY	34,184	8,843	6,880	49,907	
1.0	APPRAISAL SUPERVISOR/R	9145	HARTWELL, WILLIAM B	45,198	11,692	8,410	65,300	
1.0	APPRAISAL SUPERVISOR/R	9145	LAWSON, HENRY G	46,938	12,142	7,743	66,823	
1.0	APPRAISAL SUPERVISOR/R	9145	MILLS, ROBERT L	41,948	10,851	7,637	60,436	
1.0	APPRAISAL SUPERVISOR/R	9145	WALRUFF, RANDY P	42,470	10,986	7,530	60,986	
1.0	CHIEF APPRAISER/RES	9320	GALASH, NEAL R	57,023	14,750	9,102	80,875	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					1,083,661	280,318	186,223	1,550,202
				TEMPORARY	5200			
				OVERTIME	5300			
				PREMIUM	5400			
				TOTAL		5500	5550	
	1,083,661	280,318	186,223	1,550,202				

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND	AGENCY	ORGANIZATION	DATE	
5100	PERMANENT	175	040	7610	2/1/94	
5200	TEMPORARY:				0	
5400	PREMIUM PAY:				0	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME			PREPARED BY	
		A & T APPRAISAL			ROBERT ELLIS	
		FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7610	1/4/94	
OBJECT CODE	EXPLANATION					AMOUNT
6110	PROFESSIONAL SERVICES: CONTRACT WITH REALTORS MULTIPLE LISTING SERVICE TO OBTAIN LISTING DATA FOR RESIDENTIAL SECTION					2400
6120	PRINTING AND REPRODUCTN: CITY-COUNTY DUPLICATING AND PRINTING CHARGES INCLUDING FORMS, BUSINESS CARDS CONTINUOUS PAPER FOR COMPUTER PRINTERS, 30 BOXES DRY COPIER PAPER 8.5 X 11, 50 BOXES DRY COPIER PAPER 8.5 X 14, 15 BOXES DRY COPIER PAPER 11 X 17, 2 BOXES FAX PAPER					3500
6140	COMMUNICATIONS:					\$0
6180	REPAIRS & MAINTENANCE:					\$1,200
6190	MAINTENANCE CONTRACTS: MURATA FAX MACHINES 1 @ 250					\$250
6200	POSTAGE: See 7560					
6230	SUPPLIES:	QTY.	EACH	ITEM TOT.	\$7,710	
	CAMERA FILM: 35 MM 12 EXP COLOR	470	\$2	\$940		
	FILM DEVELOPING	470	\$6	\$2,820		
	TAPE MEASURE 100 FOOT	10	\$35	\$350		
	ATTACHE CASES 5 INCH	10	\$100	\$1,000		
	OFFICE SUPPLIES: PENS, PENCILS, PAPER, BINDERS CALENDARS, ENVELOPES, PRINTER RIBBONS, LASER PRINT CARTRIDGES, MILEAGE REPORTS ETC				\$2,100	
	PETTY CASH REIMBURSEMENTS				\$500	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME RESIDENTIAL APPRAISAL			PREPARED BY ROBERT ELLIS	
OBJECT CODE	EXPLANATION	FUND 175	AGENCY 030	ORGANIZATION 7610	DATE 1/4/94	
6310	<p>EDUCATION & TRAINING</p> <p>ASSESSORS ANNUAL CONFERENCE</p> <p>ASSESSORS MID-WINTER WORKSHOP ONE PERSON (lodging, registration, per diem, mileage)</p> <p>REAL ESTATE APPRAISER CLASSES AT PORTLAND STATE UNIVERSITY Four each Residential - Tuition & Books</p> <p>EDUCATION REIMBURSEMENTS</p> <p>FIVE SUPERVISORS/MANAGERS ATTEND DOR MGMT PROGRAMS</p> <p>APPRAISERS AND TECHS ATTEND TECHNICAL APPRAISAL COURSES</p> <p>6 Residential appraisers 360 2 Residential appraisers 720 7 appraisers 1995 required training 750 Administrative persons 500</p>	ITEM TOT.		6,355		
		\$0				
		\$400				
		\$2,400				
		\$600				
		\$625				
		\$2,330				

BUD 3

OBJECT DETAIL		ORGANIZATION NAME RESIDENTIAL APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 030	ORGANIZATION 7610	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6330	LOCAL TRAVEL AND MILEAGE: <ul style="list-style-type: none"> * Tri - Met Bus Passes (2) @ \$252 received by exempt employees * 4 exempt supervisors receive mileage reimbursement for use of personal automobiles@IRS rate of .28 mile * 1 exempt managers receive mileage reimbursement for use of automobiles@.28 mile * 23 employees (appraisers, appraisal specialists), receive mileage base of \$30.00 per month plus \$.28 per mile, per contract 	ITEM TOT.			\$35,874	
6620	DUES AND SUBSCRIPTIONS (SEE ADMIN BUDGET) KELLY BLUE BOOK RMLS PORTLAND BOARD OF REALTORS APPRAISAL INSTITUTE TEXTS NADA MOBILE HOME GUIDE MOBILE HOME BLUEBOOK PRC REALTY SYSTEMS				1610	

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A&T PERSONAL PROPERTY APPRAISAL		PREPARED BY ROBERT ELLIS	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7600	2/1/94 BUD94APP.wk3
OBJECT DETAIL		CURRENT BUDGET 1993-94	1994-95 REQUEST		DIFF
5100 PERMANENT		294,356	305,755		11,399
5200 TEMPORARY		0	0		0
5300 OVERTIME		0	0		0
5400 PREMIUM PAY		0	0		0
5500 FRINGE		79,300	79,092		(208)
DIRECT PERSONAL SERVICES		373,656	384,847		11,191
5550 INS BENEFITS		52,073	57,527		5,454
PERSONAL SERVICES		425,729	442,374		16,645
6050 COUNTY SUPPLEMENTS					0
6060 PASS THROUGH PAYMENTS					0
6110 PROFESSIONAL SERVICES		0	0		0
6120 PRINTING		5,582	2,500		(3,082)
6130 UTILITIES					0
6140 COMMUNICATIONS		0	0		0
6170 RENTALS		0	0		0
6180 REPAIRS & MAINTENANCE		0	0		0
6190 MAINTENANCE CONTRACTS		0	0		0
6200 POSTAGE (See 7560)		0	0		0
6230 SUPPLIES		365	1,100		735
6270 FOOD					0
6310 EDUCATION & TRAINING		3,220	1,950		(1,270)
6330 TRAVEL		6,358	6,080		(278)
6520 INSURANCE					0
6530 EXTERNAL DATA PROCESSING					0
6550 DRUGS					0
6580 CLAIMS PAID					0
6590 JUDGEMENTS					0
6610 AWARDS & PREMIUMS					0
6620 DUES & SUBSCRIPTIONS		61	100		39
7810 DEBT RETIREMENT					0
7820 INTEREST					0
DIRECT MATERIALS AND SERVICES		15,586	11,730		(3,856)
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		16,562	22,524		5,962
7150 TELEPHONE		4,575	4,085		(490)
7200 DATA PROC SERVICES					0
7300 MOTOR POOL SERVICES		9,212	12,000		2,788
7400 BLDG. MGT. SERVICES		15394	17274		1,880
7500 OTHER INT. SERVICES					0
7560 DISTRIBUTION/POSTAGE		0	19,830		19,830
INTERNAL SVC. REIMBURSEMENTS		45,743	75,713		29,970
TOTAL MATERIAL/SERVICES		61,329	87,443		26,114
8100 LAND					0
8200 BUILDINGS					0
8300 OTHER IMPROVEMENTS					0
8400 EQUIPMENT					0
CAPITAL OUTLAY		0	0		0
	DIRECT BUDGET	389,242	396,577		7,335
	TOTAL BUDGET	487,058	529,817		42,759

BUD 2		ORGANIZATION PERSONAL PROPERTY APPRAISAL		DATE 2/1/94	
		FUND 175	AGENCY 030	ORGANIZATION 7600	PREPARED BY ROBERT ELLIS
FTE	JOB TITLE	JOB NO.	BASE		
0.0	OFFICE ASSISTANT 2	6001	0		
0.0	OFFICE ASSISTANT/SENIOR	6002	0		
0.0	CLERICAL UNIT SUPERVISOR	6003	0		
0.0	WORD PROCESSING OPERATOR	6004	0		
4.0	APPRAISAL SPECIALIST	6029	120,196		
1.0	FISCAL SPECIALIST 2	6030	38,169		
0.0	PROPERTY APPRAISER/RES	6042	0		
0.0	TAX EXEMPTION SPECIALIST	6045	0		
0.0	PROPERTY APPRAISER/COMM	6049	0		
3.0	PROPERTY APPRAISER/PP	6050	101,746		
0.0	DATA ANALYST	6073	0		
1.0	APPRAISAL SUPERVISOR/COM/RES/PERS	9145	45,644		
0.0	OPERATIONS ADMINISTRATOR	9155	0		
0.0	CHIEF APPRAISER/RES/COM	9320	0		
0.0	SENIOR DATA ANALYST	9330	0		
0.0	VALUATION MANAGER	9420	0		
9.0		TOTAL	305,755		

PERSONNEL DETAIL		ORGANIZATION A & T PERSONAL PROPERTY APPRAISAL				DATE 2/1/94
		FUND 175	AGENCY 040	ORGANIZATION 7600	PREPARED BY ROBERT ELLIS	
JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL
				DIR	IND	
APPRAISAL SPECIALIST	6029	BAIN, JOHN C	30,673	7,934	7,126	45,733
APPRAISAL SPECIALIST	6029	KONADU, SAMMUEL A.	26,906	6,960	6,066	39,932
PROPERTY APPRAISER/P	6050	CUNNINGHAM, J MICHAEL	32,495	8,406	6,457	47,358
APPRAISAL SPECIALIST	6029	GULLEY, PAMELA D	30,673	7,934	5,265	43,872
PROPERTY APPRAISER/P	6050	HOWARD, DANIEL P	32,495	8,406	7,204	48,105
FISCAL SPECIALIST 2	6030	DIZON, AMANCIO R	38,169	9,873	7,951	55,993
PROPERTY APPRAISER/P	6050	CHRISTIAN, JON G	36,756	9,508	7,890	54,154
APPRAISAL SPECIALIST	6029	VACANT	31,944	8,263	5,101	45,309
APPRAISAL SUPERVISOR/P	9145	WEBSTER, JOHN R.	45,644	11,807	4,467	61,918
URES IN SHADED ILL TRANSFER TO ONDING LINE NUMBERS UD 1 FORM		PERMANENT	5100	79,092	57,527	442,374
			305,755			
		TEMPORARY	5200			
		OVERTIME	5300			
		PREMIUM	5400			
		TOTAL		305,755	5500	5550
				79,092	57,527	442,374

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL	PREPARED BY ROBERT ELLIS
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION	DATE
5100	PERMANENT	175 040 7600	2/1/94
5200	TEMPORARY:		
5400	PREMIUM PAY:		

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 030	ORGANIZATION 7600	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6110	PROFESSIONAL SERVICES:				0	
6120	PRINTING AND REPRODUCTN: CITY-COUNTY DUPLICATING AND PRINTING CHARGES INCLUDING FORMS, BUSINESS CARDS				2500	
6140	COMMUNICATIONS:				\$0	
6180	REPAIRS & MAINTENANCE:				\$0	
6190	MAINTENANCE CONTRACTS:				\$0	
6200	POSTAGE: See 7560					
6230	SUPPLIES:				\$1,100	
	OFFICE SUPPLIES: PENS, PENCILS, PAPER, BINDERS				\$800	
	CALENDARS, ENVELOPES, PRINTER RIBBONS, LASER					
	PRINT CARTRIDGES, MILEAGE REPORTS ETC					
	PETTY CASH REIMBURSEMENTS				\$300	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME PERSONAL PROPERTY APPRAISAL	PREPARED BY ROBERT ELLIS		
OBJECT CODE	EXPLANATION	FUND 175	AGENCY 030	ORGANIZATION 7600	DATE 1/4/94
6310	EDUCATION & TRAINING EDUCATION REIMBURSEMENTS ONE SUPERVISOR TO ATTEND DOR MGMT PROGRAMS APPRAISERS AND TECHS ATTEND TECHNICAL APPRAISAL COURSES 2 appraisers 1995 required training 7 Personal Property & Administrative persons				ITEM TOT. 1,950 200 250 \$500 1,000

BUD 3

OBJECT DETAIL		ORGANIZATION NAME PERSONAL PROPERTY APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 030	ORGANIZATION 7600	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6330	LOCAL TRAVEL AND MILEAGE:				ITEM TOT.	\$6,080
	* 1 exempt supervisor receive mileage reimbursement for use of personal automobiles@IRS rate of .28 mile				480	
	* 8 employees (appraisers, appraisal specialists), receive mileage base of \$30.00 per month plus \$.28 per mile, per contract				5,600	
6620	DUES AND SUBSCRIPTIONS (SEE ADMIN BUDGET)					100
	COMPUTER MERCHANTS				78	
	COMPUTER SHOPPER				22	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME			PREPARED BY	
		PERSONAL PROPERTY APPRAISAL			ROBERT ELLIS	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7600	1/10/94	
OBJECT CODE	EXPLANATION				AMOUNT	
7150	TELEPHONE:				\$4,085	
	VOICE MAIL		QTY.	EA.	ITEM TOT.	
	2500 set & Unity set		1	\$55	\$55	
	Long Distance, TMS		10	\$119	\$1,190	
	Directories		1	\$1,100	\$1,100	
	DN-County network line		10	\$4	\$40	
			10	\$170	\$1,700	
7300	MOTOR POOL SERVICES:				\$12,000	
	10 SPACES IN COUNTY PARKING LOT AT S.W. 2ND AND MORRISON FOR APPRAISER PARKING AT \$100 PER MONTH PER SPACE (10 * 100 * 12 = \$12,000)					
7400	BLDG. MGT. SERVICES :SPACE RENTAL				\$17,274	
7560	POSTAGE:				\$19,830	
	GENERAL POSTAGE 94	6000	@.29	\$1,740		
	GENERAL POSTAGE 95	6000	@.34	\$2,040		
	PERSONAL PROPERTY STATEMENTS	45000	@.34	\$15,300		
	MAIL CHARGE, FOLDING, STUFFING ETC.			\$750		

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A&T COMMERCIAL/INDUST APPRAISAL		PREPARED BY ROBERT ELLIS	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7590	2/1/94 BUD94APC.wk3
OBJECT DETAIL		CURRENT BUDGET 1993-94	1994-95 REQUEST		DIFF
5100 PERMANENT		802,101	891,215		89,114
5200 TEMPORARY		0	0		0
5300 OVERTIME		0	0		0
5400 PREMIUM PAY		4,170	1,910		(2,260)
5500 FRINGE		217,209	231,029		13,820
DIRECT PERSONAL SERVICES		1,023,480	1,124,154		100,674
5550 INS BENEFITS		138,608	150,766		12,158
PERSONAL SERVICES		1,162,088	1,274,920		112,832
6050 COUNTY SUPPLEMENTS					0
6060 PASS THROUGH PAYMENTS					0
6110 PROFESSIONAL SERVICES		0	0		0
6120 PRINTING		1,159	2,500		1,341
6130 UTILITIES					0
6140 COMMUNICATIONS		0	0		0
6170 RENTALS		0	0		0
6180 REPAIRS & MAINTENANCE		510	0		(510)
6190 MAINTENANCE CONTRACTS		0	0		0
6200 POSTAGE (See 7560)		0	0		0
6230 SUPPLIES		3,655	4,250		595
6270 FOOD					0
6310 EDUCATION & TRAINING		4,084	7,560		3,476
6330 TRAVEL		20,913	23,874		2,961
6520 INSURANCE					0
6530 EXTERNAL DATA PROCESSING					0
6550 DRUGS					0
6580 CLAIMS PAID					0
6590 JUDGEMENTS					0
6610 AWARDS & PREMIUMS					0
6620 DUES & SUBSCRIPTIONS		1,020	1,475		455
7810 DEBT RETIREMENT					0
7820 INTEREST					0
DIRECT MATERIALS AND SERVICES		31,341	39,659		8,318
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		44,520	61,830		17,310
7150 TELEPHONE		11,182	9,054		(2,128)
7200 DATA PROC SERVICES					0
7300 MOTOR POOL SERVICES		22,518	21,600		(918)
7400 BLDG. MGT. SERVICES		37633	45354		7,721
7500 OTHER INT. SERVICES					0
7560 DISTRIBUTION/POSTAGE		0	1,980		1,980
INTERNAL SVC. REIMBURSEMENTS		115,853	139,818		23,965
TOTAL MATERIAL/SERVICES		147,194	179,477		32,283
8100 LAND					0
8200 BUILDINGS					0
8300 OTHER IMPROVEMENTS					0
8400 EQUIPMENT					0
CAPITAL OUTLAY		0	0		0
	DIRECT BUDGET	1,054,821	1,163,813		108,992
	TOTAL BUDGET	1,309,282	1,454,397		145,115

BUD 2		ORGANIZATION COMMERCIAL/INDUST APPRAISAL			DATE 2/1/94
		FUND 175	AGENCY 030	ORGANIZATION 7590	PREPARED BY ROBERT ELLIS
FTE	JOB TITLE			JOB NO.	BASE
0.0	OFFICE ASSISTANT 2			6001	0
0.0	OFFICE ASSISTANT/SENIOR			6002	0
0.0	CLERICAL UNIT SUPERVISOR			6003	0
0.0	WORD PROCESSING OPERATOR			6004	0
0.0	APPRAISAL SPECIALIST			6029	0
0.0	FISCAL SPECIALIST 2			6030	0
0.0	PROPERTY APPRAISER/RES			6042	0
0.0	TAX EXEMPTION SPECIALIST			6045	0
18.0	PROPERTY APPRAISER/COMM			6049	655,334
0.0	PROPERTY APPRAISER/PP			6050	0
0.0	DATA ANALYST			6073	0
4.0	APPRAISAL SUPERVISOR/COM/RES/PERS			9145	176,933
0.0	OPERATIONS ADMINISTRATOR			9155	0
1.0	CHIEF APPRAISER/RES/COM			9320	58,948
0.0	SENIOR DATA ANALYST			9330	0
0.0	VALUATION MANAGER			9420	0
23.0				TOTAL	891,215

BUD 2

PERSONNEL DETAIL			ORGANIZATION A & T APPRAISAL	INDUST/COMMERCIAL	DATE 2/1/94			
			FUND 175	AGENCY 040	ORGANIZATION 7590	PREPARED BY ROBERT ELLIS		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	PROPERTY APPRAISER/C	6049	CAPPER, CLINTON M	35,465	9,174	5,498	50,137	
1.0	PROPERTY APPRAISER/C	6049	BANAHENE, OSEI-OWUSU	34,950	9,041	7,441	51,432	
1.0	PROPERTY APPRAISER/C	6049	HONDA, RODNEY R	34,692	8,974	3,501	47,167	
1.0	PROPERTY APPRAISER/C	6049	GRIER, RENE	34,062	8,811	7,906	50,779	
1.0	PROPERTY APPRAISER/C	6049	CHAMBERLAIN, MICHAEL	38,148	9,868	7,578	55,594	
1.0	PROPERTY APPRAISER/C	6049	DAILEY, PAUL T	37,340	9,659	6,223	53,222	
1.0	PROPERTY APPRAISER/C	6049	DECKER, ROBERT L	38,148	9,868	5,586	53,602	
1.0	PROPERTY APPRAISER/C	6049	FISHER, GARY B	38,148	9,868	7,447	55,463	
1.0	PROPERTY APPRAISER/C	6049	HUDSON, DANA G	38,148	9,868	7,578	55,594	
1.0	PROPERTY APPRAISER/C	6049	JOHNSON, MARGARET ROSE	38,148	9,868	6,258	54,274	
1.0	PROPERTY APPRAISER/C	6049	FEINSTEIN, MELVIN H.	35,941	9,297	6,164	51,402	
1.0	PROPERTY APPRAISER/C	6049	READ, PATTI	34,821	9,007	7,435	51,263	
1.0	PROPERTY APPRAISER/C	6049	ZURAWSKI,CAROL	34,950	9,041	6,121	50,112	
1.0	PROPERTY APPRAISER/C	6049	ROBINSON, KENNETH O	38,148	9,868	5,586	53,602	
1.0	PROPERTY APPRAISER/C	6049	RODWICK, RONALD P	38,148	9,868	7,950	55,966	
1.0	PROPERTY APPRAISER/C	6049	KATONA, MARIE	32,611	8,436	6,048	47,095	
1.0	PROPERTY APPRAISER/C	6049	WADDOUPS, PATRICIA	35,722	9,240	3,546	48,508	
1.0	PROPERTY APPRAISER/C	6049	ROSENBERGER, MARLA	37,744	9,763	7,933	55,440	
1.0	APPRAISAL SUPERVISOR/C	9145	KAMINSKI,FRANK	42,115	10,894	8,264	61,273	
1.0	APPRAISAL SUPERVISOR/C	9145	SANDERMAN, RICHARD A	46,917	12,136	8,492	67,545	
1.0	APPRAISAL SUPERVISOR/C	9145	VACANT	46,938	12,142	1,626	60,706	
1.0	APPRAISAL SUPERVISOR/C	9145	LEROUX,VICKI J.	40,963	10,596	8,210	59,769	
1.0	CHIEF APPRAISER/COMMERC	9320	SKILES, GARY G	58,948	15,248	8,313	82,509	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					891,215	230,535	150,704	1,272,454
				TEMPORARY	5200			
				OVERTIME	5300			
				PREMIUM	5400			
					1,910	494	62	2,466
				TOTAL		5500	5550	
	893,125	231,029	150,766	1,274,920				

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME			DATE PREPARED	
	A & T Appraisal Commercial			01-10-94	
	FUND	AGENCY	ORG	PREPARED BY	
	175	30	7590	ROBERT ELLIS	

TEMPORARY EMPLOYEES Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

OVERTIME PAY Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

PREMIUM PAY Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
One appraiser receives 5% monthly for approved designation pay per addendum E section 13 of the 1992-95 contract= 1910			1,910	494	62
TOTALS (TRANSFER TO BUD 2)			1,910	494	62

ie2a7590

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 040	ORGANIZATION 7590	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
5200	TEMPORARY:				0	
5400	PREMIUM PAY: 1 APPRAISER RECEIVES 5% MONTHLY FOR APPROVED DESIGNATION PAY PER ADDENDUM E SECTION 13 OF THE 1992-95 CONTRACT = 1910				ORG.=7590 1,910	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 030	ORGANIZATION 7590	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6110	PROFESSIONAL SERVICES:				0	
6120	PRINTING AND REPRODUCTN: CITY-COUNTY DUPLICATING AND PRINTING CHARGES INCLUDING FORMS, BUSINESS CARDS				2500	
6140	COMMUNICATIONS:				\$0	
6180	REPAIRS & MAINTENANCE:				\$0	
6190	MAINTENANCE CONTRACTS:				\$0	
6200	POSTAGE: See 7560					
6230	SUPPLIES:				\$4,250	
		QTY.	EACH	ITEM TOT.		
	CAMERA FILM: 35 MM 12 EXP COLOR	100	\$2	\$200		
	FILM DEVELOPING	100	\$6	\$600		
	TAPE MEASURE 100 FOOT	10	\$35	\$350		
	ATTACHE CASES 5 INCH	10	\$100	\$1,000		
				\$0		
	OFFICE SUPPLIES: PENS, PENCILS, PAPER, BINDERS			\$1,700		
	CALENDARS, ENVELOPES, PRINTER RIBBONS, LASER					
	PRINT CARTRIDGES, MILEAGE REPORTS ETC					
	PETTY CASH REIMBURSEMENTS			\$400		

BUD 3

OBJECT DETAIL		ORGANIZATION NAME COMMERCIAL/INDUST APPRAISAL			PREPARED BY ROBERT ELLIS	
		FUND 175	AGENCY 030	ORGANIZATION 7590	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6310	EDUCATION & TRAINING				ITEM TOT.	7,560
	ASSESSORS ANNUAL CONFERENCE				\$0	
	ASSESSORS MID - WINTER WORKSHOP ONE PERSON (lodging, registration, per diem, mileage)				\$400	
	REAL ESTATE APPRAISER CLASSES AT PORTLAND STATE UNIVERSITY Two each Commercial - Tuition & Books				\$1,200	
	EDUCATION REIMBURSEMENTS				\$1,000	
	5 SUPERVISORS/MANAGERS ATTEND DOR MGMT PROGRAMS				\$1,250	
	APPRAISERS AND TECHS ATTEND TECHNICAL APPRAISAL COURSES				\$3,710	
	6 Commercial appraisers				2,030	
	3 Commercial appraisers: Industrail Seminar'94 Portland				380	
	6 Commercial appraisers				300	
	8 appraisers 1994 required training				1000	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME COMMERCIAL/INDUST APPRAISAL	PREPARED BY ROBERT ELLIS			
OBJECT CODE	EXPLANATION	FUND 175	AGENCY 030	ORGANIZATION 7590	DATE 1/5/94	
6330	<p>LOCAL TRAVEL AND MILEAGE:</p> <ul style="list-style-type: none"> * Tri - Met Bus Passes (2) @ \$252 received by exempt employees * 3 exempt supervisors receive mileage reimbursement for use of personal automobiles@IRS rate of .28 mile * 1 exempt manager receive mileage reimbursement for use of automobiles@.28 mile * 18 employees (appraisers), receive mileage base of \$30.00 per month plus \$.28 per mile, per contract 				<p style="text-align: right;">ITEM TOT.</p> <p style="text-align: right;">504</p> <p style="text-align: right;">1,440</p> <p style="text-align: right;">330</p> <p style="text-align: right;">21,600</p>	<p>\$23,874</p>
6620	<p>DUES AND SUBSCRIPTIONS (SEE ADMIN BUDGET)</p> <ul style="list-style-type: none"> REAL ESTATE TRANSATION JOURNAL DOLLARS & CENTS OF SHOPPING CENTERS APPRAISAL INSTITUTE MARSHALL & SWIFT 				<p style="text-align: right;">810</p> <p style="text-align: right;">250</p> <p style="text-align: right;">155</p> <p style="text-align: right;">260</p>	<p>1475</p>

BUD 3

OBJECT DETAIL		ORGANIZATION NAME			PREPARED BY	
		COMMERCIAL/INDUST APPRAISAL			ROBERT ELLIS	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7590	1/10/94	
OBJECT CODE	EXPLANATION				AMOUNT	
7150	TELEPHONE:				\$9,054	
			QTY.	EA.	ITEM TOT.	
	Multi-Line set		1	\$212	\$212	
	2500 set & Unity set		23	\$119	\$2,737	
	Cellular Phone		1	\$496	\$496	
	Speaker Phone		1	\$159	\$159	
	Voice Mail		5	\$51	\$255	
			0	\$0	\$0	
			0	\$0	\$0	
	Other equipment access		1	53	\$53	
	Long Distance, TMS		1	\$800	\$800	
			0	\$0	\$0	
	Directories		23	\$4	\$92	
	DN-County network line		25	\$170	\$4,250	
7300	MOTOR POOL SERVICES:				\$21,600	
	18 SPACES IN COUNTY PARKING LOT AT S.W. 2ND AND MORRISON FOR APPRAISER PARKING AT \$100 PER MONTH PER SPACE (18 * 100 * 12 = \$21600)					
7400	BLDG. MGT. SERVICES :SPACE RENTAL				\$45,354	
7560	POSTAGE:				\$1,980	
	GENERAL POSTAGE 94	500	@.29	\$145		
	GENERAL POSTAGE 95	500	@.34	\$170		
	MISC/CERTIFIED MAIL			\$250		
	MAIL CHARGE, FOLDING, STUFFING ETC.			\$400		
	INCOME QUESTIONAIRS 94	3500	@.29	\$1,015		

Tax Collect.

BUD 1

BUDGET REQUEST	AGENCY DES	ORGANIZATION A&T TAX COLLECTION		PREPARED BY KATHY TUNEBERG	
	LGFS CODE	FUND	AGENCY	ORGANIZATION	DATE
		175	030	7630	02/01/94 BUD94TC.WK3
OBJECT DETAIL		CURRENT BUDGET 1993-94	BUDGET REQUEST 1994-95	NET DIFF	
5100 PERMANENT		656,558	654,907	(1,651)	
5200 TEMPORARY		32,892	32,892	0	
5300 OVERTIME			3,500	3,500	
5400 PREMIUM PAY				0	
5500 FRINGE		179,555	173,033	(6,522)	
DIRECT PERSONAL SERVICES		869,005	864,332	(4,673)	
5550 INS BENEFITS		129,258	125,629	(3,629)	
PERSONAL SERVICES		998,263	989,961	(8,302)	
6050 COUNTY SUPPLEMENTS				0	
6060 PASS THROUGH PAYMENTS				0	
6110 PROFESSIONAL SERVICES		52,050	99,300	47,250	
6120 PRINTING		17,500	21,000	3,500	
6130 UTILITIES				0	
6140 COMMUNICATIONS				0	
6170 RENTALS		3,600	3,600	0	
6180 REPAIRS & MAINTENANCE		1,550	2,000	450	
6190 MAINTENANCE CONTRACTS		17,500	18,000	500	
6200 POSTAGE (See 7560)		0	0	0	
6230 SUPPLIES		8,150	8,150	0	
6270 FOOD				0	
6310 EDUCATION & TRAINING		3,723	2,900	(823)	
6330 TRAVEL		1,056	804	(252)	
6520 INSURANCE				0	
6530 EXTERNAL DATA PROCESSING				0	
6550 DRUGS				0	
6580 CLAIMS PAID				0	
6590 JUDGEMENTS				0	
6610 AWARDS & PREMIUMS				0	
6620 DUES & SUBSCRIPTIONS		332	332	0	
7810 DEBT RETIREMENT				0	
7820 INTEREST				0	
DIRECT MATERIALS AND SERVICES		105,461	156,086	50,625	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		50,408	66,025	15,617	
7150 TELEPHONE		16,611	18,200	1,589	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		500	500	0	
7400 BLDG. MGT. SERVICES		91414	91695	281	
7500 OTHER INT. SERVICES		69,800	65,605	(4,195)	
7560 DISTRIBUTION/POSTAGE		150,000	165,000	15,000	
INTERNAL SVC. REIMBURSEMENTS		378,733	407,025	28,292	
TOTAL MATERIAL/SERVICES		484,194	563,111	78,917	
8100 LAND				0	
8200 BUILDINGS				0	
8300 OTHER IMPROVEMENTS				0	
8400 EQUIPMENT		3,500	1,500	(2,000)	
CAPITAL OUTLAY		3,500	1,500	(2,000)	
	DIRECT BUDGET	977,966	1,021,918	43,952	
	TOTAL BUDGET	1,485,957	1,554,572	68,615	

BUD 2 SUMMARY

		ORGANIZATION A&T TAX COLLECTION		DATE 02/01/94	
		FUND 175	AGENCY 030	ORGANIZATION 7630	PREPARED BY KATHY TUNEBERG
FTE	JOB TITLE	JOB NO.		BASE	
10.50	OFFICE ASSISTANT 2	6001		238,735	
3.0	OFFICE ASSISTANT/SENIOR	6002		75,885	
1.0	CLERICAL UNIT SUPERVISOR	6003		30,673	
1.0	TAXCOLLECTIONSPEC	6025		30,360	
3.0	FISCAL SPECIALIST 1	6029		90,865	
1.0	FISCAL SPECIALIST 2	6030		36,108	
1.0	FISCAL ASSISTANT	6028		20,211	
1.0	TAX COLLECT MANAGER	9320		55,576	
1.0	FISCAL SPECIALIST SUPERV	9340		48,793	
0.7	OPERATIONS ADMINISTRATOR	9720		27,702	
23.17		TOTAL		654,907	

BUD 2

PERSONNEL DETAIL			ORGANIZATION A&T TAX COLLECTION				DATE 02/01/94	
			FUND 175	AGENCY 030	ORGANIZATION 7630	PREPARED BY KATHY TUNEBERG		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
0.5	OFFICE ASSISTANT 2	6001	Grenfell, Wanda	10,680	2,763	2,447	15,890	
1.0	OFFICE ASSISTANT 2	6001	Witka, Vanessa	24,033	6,217	3,045	33,295	
1.0	OFFICE ASSISTANT 2	6001	Jones, Teresa	20,149	5,212	4,156	29,517	
1.0	OFFICE ASSISTANT 2	6001	Anderson, Gail	24,033	6,217	4,771	35,021	
1.0	OFFICE ASSISTANT 2	6001	Drinkwater, Mary	24,033	6,217	3,373	33,623	
1.0	OFFICE ASSISTANT 2	6001	South, Linda	20,203	5,226	6,612	32,041	
1.0	OFFICE ASSISTANT/SENIOR	6002	Kilmartin, Patrice	24,562	6,354	6,996	37,912	
0.00		6001		0	0	0	0	
1.0	OFFICE ASSISTANT 2	6001	McDow, Khabira	24,033	6,217	3,045	33,295	
1.0	OFFICE ASSISTANT 2	6001	McFarland, Sandra	24,033	6,217	4,981	35,231	
1.0	OFFICE ASSISTANT 2	6001	Russell, Mary	22,444	5,806	7,408	35,658	
1.0	OFFICE ASSISTANT/SENIOR	6002	Thompson, Patricia	24,562	6,354	5,676	36,592	
1.0	OFFICE ASSISTANT 2	6001	Wolf, Marie	22,752	5,885	6,788	35,425	
1.0	OFFICE ASSISTANT/SENIOR	6002	Hilton, Albert B	26,761	6,922	2,886	36,569	
1.0	OFFICE ASSISTANT 2	6001	Ballew, Mollie	22,343	5,780	5,582	33,705	
1.0	CLERICAL UNIT SUPERVISOR	6003	Butler, Eunice	30,673	7,934	5,937	44,544	
1.0	TAX COLLECTIONS SPEC	6025	Gruber, Joy	30,360	7,853	3,645	41,858	
				0	0	0	0	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
				TEMPORARY	5200			
				OVERTIME	5300			
				PREMIUM	5400			
				TOTAL				

SEE NEXT PAGE FOR ORG. TOTALS

BUD 2

PERSONNEL DETAIL			ORGANIZATION A&T TAX COLLECTION				DATE 02/01/94	
			FUND 175	AGENCY 030	ORGANIZATION 7630	PREPARED BY KATHY TUNEBERG		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	FISCAL SPECIALIST 1	6029	Halm, Rose	30,673	7,934	5,937	44,544	
1.0	FISCAL SPECIALIST 1	6029	Long, Debra	29,519	7,636	7,581	44,736	
1.0	FISCAL SPECIALIST 1	6029	Meyer, Deanna	30,673	7,934	5,937	44,544	
1.0	FISCAL SPECIALIST 2	6030	Smith, Calvin	36,108	9,340	5,526	50,974	
1.0	FISCAL ASSISTANT	6028	Vacant	20,211	5,228	4,647	30,086	
0.67	OPERATIONS ADMINISTRATOR	9720	Frahler, Patricia (.33 to tax title)	27,702	7,166	2,852	37,719	
1.0	TAX COLLECT MANAGER	9320	Tuneberg, Kathleen	55,576	14,376	8,903	78,855	
1.0	FISCAL SPECIALIST SUPERV	9340	Bartholomew, Gary	48,793	12,622	6,080	67,495	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					654,907	169,408	124,811	949,127
				TEMPORARY	5200			
					32,892	2,719	704	36,315
				OVERTIME	5300			
					3,500	905	114	4,519
				PREMIUM	5400			
TOTAL				691,299	173,033	125,629	989,961	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A&T TAX COLLECTION		PREPARED BY KATHY TUNEERG	
OBJECT CODE	EXPLANATION			DATE	
5100	PERMANENT	23.17 FTE (.5 OAll Shared with Lic/Passports & 1/3 operations manager to tax title)	175	030	7630
5200	TEMPORARY	To provide adequate staffing during heavy tax collection period November (2000 hrs @8.75) 17,500 February (850 hrs @8.75) 7,438 May-June (909 hrs @8.75) 7,954	175	030	7630
5300	OVERTIME	To provide needed staffing for payment processing during trimester collection periods	175	030	7630

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A&T TAX COLLECTION			PREPARED BY KATHY TUNEBERG	
		FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7630	1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6110	PROFESSIONAL SERVICES (see bud 3a)				\$99,300	
	Legal required advertising:					
	Personal property warrents		6300			
	Personal property warrant recording fees		22000			
	Property foreclosure		15000			
	Total Advertising and Recording Fees		43300			
	Security Guard		1000			
	CIS (12 months @ \$150)		1800 (see 3a)			
	Armored Car Service		3200 (see 3a)			
	Title Search Reports (250 @ \$200)		50000 (see 3a)			
6120	PRINTING AND REPRODUCTION (envelopes)				\$21,000	
6170	RENTAL Silex 3580 Model Copier		3600	\$3,600		
6180	REPAIRS & MAINTENANCE (film paks and misc. equip. repairs)				\$2,000	
6190	MAINTENANCE CONTRACTS (see bud 3a)				\$18,000	
6200	POSTAGE (see 7560)				\$0	
6230	SUPPLIES				\$8,150	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A&T TAX COLLECTION			PREPARED BY KATHY TUNEBERG	
		FUND	AGENCY	ORGANIZATION	DATE	
		175	175	7630	1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6310	EDUCATION & TRAINING	Page Total			2,900	
	1. Assessor's Mid-Winter Conference 2 people (registration, lodging, mileage, per diem)	ITEM TOT.			900	
	2. Tax Collector's Annual Conference 2 people (3 days, registration, lodging, mileage, per diem)	ITEM TOT.			800	
	3. Department of Revenue Supervisors/Management/Technical Training 2 people (tuition, mileage, per diem)	ITEM TOT.			600	
	4. Tax Collectors District Meetings	ITEM TOT.			50	
	5. Remittance Processors Users Group Meetings	ITEM TOT.			50	
	6. DOR Sponsored Training	ITEM TOT.			200	
	7. Tuition Reimbursement	ITEM TOT.			300	
		Page Total 1			2,900	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A&T TAX COLLECTION			PREPARED BY KATHY TUNEBERG	
		FUND	AGENCY	ORGANIZATION	DATE	
		175	030	7630	1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6330	LOCAL TRAVEL AND MILEAGE Tri - Met Bus Passes (2 @ \$252.) Mileage \$255. (local)				ITEM TOT. 504 300	
6620	DUES & SUBSCRIPTIONS (Tax Collections)				\$332	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A&T TAX COLLECTION			PREPARED BY KATHY TUNEBERG	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	AMOUNT
		175	030	7630	1/10/94	
7150	TELEPHONE					\$18,200
	Voice Mail			QTY. 3	EA. \$51	ITEM TOT. \$153
	Digit Display			1	\$309	\$309
	SL1s			14	\$213	\$2,982
	2500s			9	\$120	\$1,080
	Speaker Phone			1	\$372	\$372
	DID Lines(3326,3330,3334,3365,3374,3380,5132,fax)			8	\$310	\$2,480
	DN Lines			32	\$172	\$5,504
	County Directories			28	\$4	\$109
	Headsets			10	\$120	-\$1,200
	Long Distance(1275),moves(1100),new unit(400)				2,775	\$2,775
	Auto attendant 2 @ 438			2	438	\$876
	Unity Phones (collection area) single line (4139,6990,2366)			3	120	\$360
7300	MOTOR POOL SERVICES					\$500
7400	SPACE RENTAL					\$91,695
	6478 square feet @ 13.57 = 87928 Plus 4%			91445		
	Alarm monitoring by fac mgmt 250			250		
7500	OTHER INTERNAL SERVICES					\$65,605
	Tax Remittance Processing Equipment (Third Party)					
7560	DISTRIBUTION/POSTAGE					\$165,000

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A&T TAX COLLECTION	PREPARED BY KATHY TUNEBERG
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION 175 030 7630	DATE 1/5/94
8300	OTHER IMPROVEMENTS		
8400	EQUIPMENT: FAX MACHINE		1,500

BUD 3a

CONTRACTS		ORGANIZATION NAME A&T TAX COLLECTION			PREPARED BY KATHY TUNEBERG	
		FUND 175	AGENCY 030	ORGANIZATION 7630	DATE 1/5/94	
OBJECT CODE	CONTRACT DESCRIPTION	CONTACT PERSON		ESTIMATED AWARD	TYPE	AMOUNT
6110.0	Oregon Armored Car Service (armored pickup service)	K. Tuneberg			PSA	1,800
	TITLE CO's (to be determined)	K. Tuneberg			PSA	50,000
						0
6190.0	Maintenance Contract: Remittance Processing Equipment	K. Tuneberg			MNT	17,000
	Maintenance Contract: Sweda Cash Registers	K. Tuneberg			MNT	500

REQUEST TO CREATE/RECLASSIFY A POSITION

1. List the proposed duties of the position (please do not copy from the class specification):

a. *See attached*

b.

c.

d.

Use the reverse side or attach additional sheets, if needed.

2. State the proposed classification title:

Fiscal Assistant

3. Is this a new position? YES NO

4. If this is an existing position, state the name of the incumbent:

5. Proposed effective date of change: *7/1/94*

Hiring Manager: _____

Date: _____ Dept/Div: _____

EMPLOYEE RELATIONS DIVISION USE ONLY

Action: Approved as submitted

Approved for classification title

Denied (for Reclassification Requests only)

Analyst Name

Danaed Whitley

Date

1/24/94

TAX ACCOUNTING ASSISTANT

PROPOSED DUTIES

1. Sort, distribute, file and archive accounting records.
2. Check payment batch reports and check payment info for correct account numbers.
3. Retrieve payment information on microfilm reader/printer and microfiche reader/printer.
4. Assist with processing of refunds.
5. Access tax information on computer terminals and run printouts.
6. Process corrected tax statements.
7. Process W-9 forms and information for 1099 reporting.
8. Perform mathematical calculations using 10 key calculator.
9. Answer phones, type, photocopy, prepare mailings, etc.
10. Perform related duties as assigned.

BOE

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION Board Of Equalization		PREPARED BY CAL SMITH	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	7390	02/01/94 BUD94BOE.wk3
OBJECT DETAIL		CURRENT BUDGET 93-94	BUDGET REQUEST 94-95	NET DIFF	
5100 PERMANENT		47,733	61,860	14,127	
5200 TEMPORARY		18,198	21,199	3,001	
5300 OVERTIME				0	
5400 PREMIUM PAY				0	
5500 FRINGE		14,341	17,755	3,414	
DIRECT PERSONAL SERVICES		80,272	100,814	20,541	
5550 INS BENEFITS		8,755	7,918	(838)	
PERSONAL SERVICES		89,028	108,731	19,704	
6050 COUNTY SUPPLEMENTS				0	
6060 PASS THROUGH PAYMENTS				0	
6110 PROFESSIONAL SERVICES		58,864	60,292	1,428	
6120 PRINTING		4,000	6,000	2,000	
6130 UTILITIES				0	
6140 COMMUNICATIONS				0	
6170 RENTALS				0	
6180 REPAIRS & MAINTENANCE		400	400	0	
6190 MAINTENANCE CONTRACTS				0	
6200 POSTAGE (See 7560)		0	0	0	
6230 SUPPLIES		1,200	2,000	800	
6270 FOOD				0	
6310 EDUCATION & TRAINING		450	0	(450)	
6330 TRAVEL		162	162	0	
6520 INSURANCE				0	
6530 EXTERNAL DATA PROCESSING				0	
6550 DRUGS				0	
6580 CLAIMS PAID				0	
6590 JUDGEMENTS				0	
6610 AWARDS & PREMIUMS				0	
6620 DUES & SUBSCRIPTIONS				0	
7810 DEBT RETIREMENT				0	
7820 INTEREST				0	
DIRECT MATERIALS AND SERVICES		65,076	68,854	3,778	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		6,180	9,242	3,062	
7150 TELEPHONE		2,211	2,113	(98)	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		0	0	0	
7400 BLDG. MGT. SERVICES (1333 sq ft @ 6.10)		1760	8462	6,702	
7500 OTHER INT. SERVICES		0	0	0	
7560 DISTRIBUTION/POSTAGE		17,500	20,000	2,500	
INTERNAL SVC. REIMBURSEMENTS		27,651	39,817	12,166	
TOTAL MATERIAL/SERVICES		92,727	108,671	15,944	
8100 LAND				0	
8200 BUILDINGS				0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		0	0	0	
CAPITAL OUTLAY		0	0	0	
DIRECT BUDGET		145,348	169,668	24,319	
TOTAL BUDGET		181,755	217,403	35,648	

		ORGANIZATION Board Of Equalization		DATE 02/01/94
		FUND 175	AGENCY 030	ORGANIZATION 7390
		PREPARED BY CAL SMITH		
FTE	JOB TITLE			JOB NO.
				BASE
1.0	OFFICE ASSISTANT 2			6001
				23,420
1.0	BD OF EQUALIZATION ADMINISTRATOR			9004
				38,440
2				TOTAL
				61,860

BUD 2

PERSONNEL DETAIL			ORGANIZATION Board Of Equalization				DATE 02/01/94	
			FUND 175	AGENCY 030	ORGANIZATION 7390	PREPARED BY CAL SMITH		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	OFFICE ASSISTANT 2	6001	GALLOWAY, MARION	23,420	6,058	3,347	32,825	
1.0	BD OF EQUALIZATION ADMINI	9004	RUDOLPH, SHERRILL	38,440	9,944	4,117	52,501	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM			PERMANENT	5100	16,002	7,464	85,326	
				61,860				
			TEMPORARY	5200	1,753	454	23,405	
				21,199				
			OVERTIME	5300			0	
			PREMIUM	5400			0	
			TOTAL			83,059	17,755	7,918

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME			DATE PREPARED	
	Board Of Equalization			01-10-94	
	FUND	AGENCY	ORG	PREPARED BY	
	175	30	7390	CAL SMITH	

TEMPORARY EMPLOYEES Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
Provide adequate staffing during Appeals process					
OAll @ 1024 hrs @9.00	1,024	9.00	9,216	762	197
OAll @ 826 hrs @8.31	826	8.31	6,864	567	147
OAll @ 616 hrs @8.31	616	8.31	5,119	423	110
Receive, review, input, file BOE/BORR Appeals and take minutes, assist Board members during hearings.					
TOTALS (TRANSFER TO BUD 2)			21,199	1,753	454

OVERTIME PAY Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

PREMIUM PAY Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

2a7390

BUD 3

OBJECT DETAIL		ORGANIZATION NAME Board Of Equalization		PREPARED BY CAL SMITH	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE
		175	030	7390	1/10/94
7150	TELEPHONES				
	DID Line (5241)			1 @\$310	\$310
	DN Line (6252, 2315)			2 @\$172	\$344
	SL1			3 @\$213	\$639
	Long Distance(200) and Street address directories(500)				\$700
	Headset			1 @\$120	\$120
				SUM	\$2,113
7400	COUNTY BUILDING SPACE 1333 SQ FT @ 6.10 plus 4%				\$8,462
7560	DISTRIBUTION/POSTAGE				\$20,000

FACILITIES EX T

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION FACILITIES TAX TITLE		PREPARED BY CAL SMITH	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	5655	02/01/94 BUD94FTT.wk3
OBJECT DETAIL		CURRENT BUDGET 93-94	BUDGET REQUEST 94-95	NET DIFF	
5100 PERMANENT		72,725	76,338	3,613	
5200 TEMPORARY		0	0	0	
5300 OVERTIME		6,239	3,494	(2,745)	
5400 PREMIUM PAY		0	0	0	
5500 FRINGE		21,478	20,650	(828)	
DIRECT PERSONAL SERVICES		100,442	100,482	40	
5550 INS BENEFITS		15,135	16,015	880	
PERSONAL SERVICES		115,577	116,497	920	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES			0	0	
6120 PRINTING			0	0	
6130 UTILITIES		2,500	3,000	500	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS		7,500	7,500	0	
6180 REPAIRS & MAINTENANCE		135,236	350,000	214,764	
6190 MAINTENANCE CONTRACTS		0	0	0	
6200 POSTAGE (See 7560)		0	0	0	
6230 SUPPLIES		500	500	0	
6270 FOOD		0	0	0	
6310 EDUCATION & TRAINING		250	500	250	
6330 TRAVEL		0	0	0	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		0	0	0	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		150	150	0	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		146,136	361,650	215,514	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		15,478	24,817	9,339	
7150 TELEPHONE		1,244	2,260	1,016	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		5,500	3,600	(1,900)	
7400 BLDG. MGT. SERVICES		2112	4974	2,862	
7500 OTHER INT. SERVICES		181,760	69,956	(111,804)	
7560 DISTRIBUTION/POSTAGE		0	0	0	
INTERNAL SVC. REIMBURSEMENTS		206,094	105,607	(100,487)	
TOTAL MATERIAL/SERVICES		352,230	467,257	115,027	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		1,500	0	(1,500)	
CAPITAL OUTLAY		1,500	0	(1,500)	
DIRECT BUDGET		246,578	462,132	215,554	
TOTAL BUDGET		469,307	583,754	114,447	

ORGANIZATION
FACILITIES TAX TITLE

DATE
02/01/94

FUND AGENCY ORGANIZATION
175 030 5655

PREPARED BY
CAL SMITH

FTE	JOB TITLE	JOB NO.	BASE
1.0	CONST PROJ SPEC	6017	38,169
1.0	PROP MGMNT SPEC	6113	38,169
4		TOTAL	76,338

BUD 2

PERSONNEL DETAIL			ORGANIZATION FACILITIES TAX TITLE				DATE 02/01/94	
			FUND 175	AGENCY 030	ORGANIZATION 5655	PREPARED BY CAL SMITH		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
				0	0	0	0	
				0	0	0	0	
1.0	CONST PROJ SPEC	6017	JONES, PATRICK L.	38,169	9,873	7,951	55,993	
1.0	PROP MGMNT SPEC	6113	BAXTER, LAURENCE C.	38,169	9,873	7,951	55,993	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					76,338	19,746	15,902	111,986
				TEMPORARY	5200			
					0	0	0	0
				OVERTIME	5300			
					3,494	904	113	4,511
				PREMIUM	5400			
	0			0				
TOTAL				79,832	20,650	16,015	116,497	

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME			DATE PREPARED	
	Facilities Tax Title			01-10-94	
	FUND	AGENCY	ORG	PREPARED BY	
	175	30	5655	CAL SMITH	

TEMPORARY EMPLOYEES					
Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

OVERTIME PAY					
Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
Property Management Specialist to prepare for and attend public hearings, committee meetings, on site maintenance and to market inventory of unsold property.	130	26.88	3,494	904	113
TOTALS (TRANSFER TO BUD 2)			3,494	904	113

PREMIUM PAY					
Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

2a5655

OBJECT DETAIL		ORGANIZATION NAME FACILITIES TAX TITLE			PREPARED BY CAL SMITH
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE
		175	030	5655	02/01/94
5100	PERMANENT 2 FTE				76,338
5200	TEMPORARY				0
5300	OVERTIME 130 HOURS AT 26.88/HR FOR PROPERTY MANAGEMENT SPECIALIST TO PREPARE FOR AND ATTEND BOARD MEETING, PUBLIC HEARINGS, COMMITTEE MEETINGS , ON SITE COLLECTIONS AND TO MARKET INVENTORY OF UNSOLD PROPERTY				3,494

BUD 3

OBJECT DETAIL		ORGANIZATION NAME FACILITIES TAX TITLE			PREPARED BY CAL SMITH	
		FUND 175	AGENCY 030	ORGANIZATION 5655	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6110	PROFESSIONAL SERVICES				\$0	
6120	PRINTING AND REPRODUCTION				\$0	
6130	UTILITIES				\$3,000	
6170	RENTALS RENTAL OF VEHICLE FOR PRIVATE INDUSTRY COUNCIL CREW TO MAINTAIN LOTS				\$7,500	
6180	REPAIRS & MAINTENANCE SECURING VACANT AND ABANDONED STRUCTURES, MAKING MINOR REPAIRS, ABATING NUISANCES, DEMOLISHING DANGEROUS BUILDINGS REHABING TEN HOUSES				\$350,000	
6230	OFFICE SUPPLIES OFFICE SUPPLIES AND COMPUTER SOFTWARE				\$500	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME FACILITIES TAX TITLE			PREPARED BY CAL SMITH	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	
6310	EDUCATION & TRAINING	175	030	5655	1/5/94	
						500

BUD 3

OBJECT DETAIL		ORGANIZATION NAME FACILITIES TAX TITLE			PREPARED BY CAL SMITH	
		FUND 175	AGENCY 030	ORGANIZATION 5655	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6330	LOCAL TRAVEL AND MILEAGE				\$0	
6620	DUES AND SUBSCRIPTIONS DUES FOR OREGON PUBLIC PROPERTY MANAGERS ASSOCIATION,DJC SUBSCRIPTION				\$150	

Tax Time

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION TAX TITLE		PREPARED BY CAL SMITH	
		FUND	AGENCY	ORGANIZATION	DATE
		175	030	5655	02/01/94
OBJECT DETAIL		CURRENT BUDGET 93-94	BUDGET REQUEST 94-95	NET DIFF	BUD94TAX.wk3
5100 PERMANENT		70,439	82,907	12,468	
5200 TEMPORARY		0	0	0	
5300 OVERTIME		750	750	0	
5400 PREMIUM PAY		0	0	0	
5500 FRINGE		17,043	21,640	4,597	
DIRECT PERSONAL SERVICES		88,232	105,297	17,065	
5550 INS BENEFITS		14,019	16,584	2,565	
PERSONAL SERVICES		102,251	121,882	19,631	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		0	0	0	
6110 PROFESSIONAL SERVICES		22,500	20,000	(2,500)	
6120 PRINTING		500	500	0	
6130 UTILITIES		0	0	0	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS		0	0	0	
6180 REPAIRS & MAINTENANCE		0	0	0	
6190 MAINTENANCE CONTRACTS		0	0	0	
6200 POSTAGE (See 7560)		0	0	0	
6230 SUPPLIES		3,000	500	(2,500)	
6270 FOOD		0	0	0	
6310 EDUCATION & TRAINING		250	500	250	
6330 TRAVEL		0	0	0	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		0	0	0	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		150	100	(50)	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		26,400	21,600	(4,800)	
7100 INDIRECT COSTS (at .0444 of PER,M&S,7xxx)		4,365	7,905	3,540	
7150 TELEPHONE		2,244	1,379	(865)	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		0	0	0	
7400 BLDG. MGT. SERVICES		0	1,186	1,186	
7500 OTHER INT. SERVICES		0	27,000	27,000	
7560 DISTRIBUTION/POSTAGE		4,500	5,000	500	
INTERNAL SVC. REIMBURSEMENTS		11,109	42,470	31,361	
TOTAL MATERIAL/SERVICES		37,509	64,070	26,561	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		0	1,500	1,500	
CAPITAL OUTLAY		0	1,500	1,500	
	DIRECT BUDGET	114,632	126,897	12,265	
	TOTAL BUDGET	139,760	187,452	47,692	

			ORGANIZATION TAX TITLE	DATE 02/01/94
			FUND AGENCY ORGANIZATION	PREPARED BY
			175 030 5655	CAL SMITH
FTE	JOB TITLE		JOB NO.	BASE
1.0	OFFICE ASSISTANT 2		6001	20,032
1.0	OFFICE ASSISTANT 2		6001	21,934
1.0	OFFICE ASSISTANT/SENIOR		6002	27,297
0.33	OPERATIONS SUPERVISOR		9720	13,644
3.33			TOTAL	82,907

BUD 2

PERSONNEL DETAIL			ORGANIZATION TAX TITLE	DATE 02/01/94				
			FUND 175	AGENCY 030	ORGANIZATION 5655	PREPARED BY CAL SMITH		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	OFFICE ASSISTANT 2	6001	VACANT	20,032	5,182	4,715	29,929	
1.0	OFFICE ASSISTANT 2	6001	MAXWELL, GWENDOLYN	21,934	5,674	7,256	34,864	
1.0	OFFICE ASSISTANT/SENIOR	6002	SCOTT, BEVERLY E.	27,297	7,061	3,185	37,543	
0.33	OPERATIONS ADMINISTRATOR	9720	FRAHLER, PATRICIA	13,644	3,529	1,404	18,578	
							0	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM				PERMANENT	5100			
					82,907	21,446	16,560	120,914
				TEMPORARY	5200			
					0	0	0	0
				OVERTIME	5300			
					750	194	24	968
				PREMIUM	5400			
					0			0
TOTAL				83,657	21,640	16,584	121,882	

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME			DATE PREPARED	
	Tax Title			01-10-94	
	FUND	AGENCY	ORG	PREPARED BY	
	175	30	5655	CAL SMITH	

TEMPORARY EMPLOYEES					
Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

OVERTIME PAY					
Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
Open house to market unsold property (weekends) Giving buyers the opportunity to view the houses before the sale appears to increase the sales price.			750	194	24
TOTALS (TRANSFER TO BUD 2)			750	194	24

PREMIUM PAY					
Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

2a5655t

OBJECT DETAIL	ORGANIZATION NAME			PREPARED BY
	TAX TITLE			CAL SMITH
	FUND	AGENCY	ORGANIZATION	DATE
	175	030	5655	02/01/94

OBJECT CODE	EXPLANATION	AMOUNT
5100	PERMANENT 3.33 FTE	82,907
5200	TEMPORARY	0
5300	OVERTIME-open house on weekends to market unsold property	750

BUD 3

OBJECT DETAIL		ORGANIZATION NAME TAX TITLE			PREPARED BY CAL SMITH	
		FUND 175	AGENCY 030	ORGANIZATION 5655	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6110	PROFESSIONAL SERVICES ADVERTISING COSTS, TITLE SEARCHES TO COMPLY WITH ORDINANCE 630				\$20,000	
6120	PRINTING AND REPRODUCTION PRINTING SIGNS, NOTICE OF SALES, PROPERTY LISTS AND MAPS				\$500	
6130	UTILITIES					
6170	RENTALS				\$0	
6180	REPAIRS & MAINTENANCE				\$0	
6200	POSTAGE (See 7560)				\$0	
6230	OFFICE SUPPLIES OFFICE SUPPLIES AND COMPUTER SOFTWARE				\$500	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME			PREPARED BY
		TAX TITLE			CAL SMITH
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE
		175	030	5655	1/5/94
OBJECT CODE	EXPLANATION				AMOUNT
6310	EDUCATION & TRAINING TOTAL PURCHASE OF REFERENCE MATERIALS				500

BUD 3

OBJECT DETAIL		ORGANIZATION NAME TAX TITLE	PREPARED BY CAL SMITH
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION	DATE
6330	LOCAL TRAVEL AND MILEAGE	175 030 5655	1/5/94
6620	DUES AND SUBSCRIPTIONS DUES FOR OREGON PUBLIC PROPERTY MANAGERS ASSOCIATION		

BUD 3

OBJECT DETAIL		ORGANIZATION NAME TAX TITLE			PREPARED BY CAL SMITH	
		FUND 175	AGENCY 030	ORGANIZATION 5655	DATE 1/5/94	
OBJECT CODE	EXPLANATION				AMOUNT	
8300	OTHER IMPROVEMENTS				\$ 0	
8400	EQUIPMENT - PERSONAL COMPUTER FOR STAFF ADDED IN 93-94				1,500	

Recording

BUD 1

BUDGET REQUEST	AGENCY DES LGFS CODE	ORGANIZATION A & T RECORDING		PREPARED BY JAMES CZMOWSKI	
		FUND	AGENCY	ORGANIZATION	DATE
		100	030	7575	1/10/94
OBJECT DETAIL		CURRENT BUDGET 1993-94	1994-95 BUDGET REQUEST		BUD94RR.wk3
5100 PERMANENT		164,798	192,514	27,716	
5200 TEMPORARY (B)		6,420	3,025	(3,395)	
5300 OVERTIME (B)		0	0	0	
5400 PREMIUM PAY (B)		750	5,000	4,250	
5500 FRINGE (C)		45,121	51,356	6,235	
DIRECT PERSONAL SERVICES		217,089	251,895	34,806	
5550 INS BENEFITS (C)		34,360	44,729	10,369	
PERSONAL SERVICES		251,449	296,624	45,175	
6050 COUNTY SUPPLEMENTS (A)		0	0	0	
6060 PASS THROUGH PAYMENTS (A)		0	0	0	
6110 PROFESSIONAL SERVICES (A)		0	0	0	
6120 PRINTING (B)		28,000	35,820	7,820	
6130 UTILITIES (B)		0	0	0	
6140 COMMUNICATIONS (B)		0	0	0	
6170 RENTALS (A)		21,534	3,600	(17,934)	
6180 REPAIRS & MAINTENANCE (B)		3,000	5,000	2,000	
6190 MAINTENANCE CONTRACTS (A)		3,288	3,500	212	
6200 POSTAGE (B)(See 7560)		0	0	0	
6230 SUPPLIES (B)		9,224	12,900	3,676	
6270 FOOD (A)		0	0	0	
6310 EDUCATION & TRAINING (B)		1,328	1,900	572	
6330 TRAVEL (B)		452	380	(72)	
6520 INSURANCE (A)		0	0	0	
6530 EXTERNAL DATA PROCESSING (A)		0	0	0	
6550 DRUGS (A)		0	0	0	
6580 CLAIMS PAID (B)		0	0	0	
6590 JUDGEMENTS (A)		0	0	0	
6610 AWARDS & PREMIUMS (B)		0	0	0	
6620 DUES & SUBSCRIPTIONS (B)		0	0	0	
7810 DEBT RETIREMENT (A)		0	0	0	
7820 INTEREST (A)		0	0	0	
DIRECT MATERIALS AND SERVICES		66,826	63,100	(3,726)	
7100 INDIRECT COSTS (A)		0	0	0	
7150 TELEPHONE (B)		4,774	4,974	200	
7200 DATA PROC SERVICES (B)		0	0	0	
7300 MOTOR POOL SERVICES (B)		0	0	0	
7400 BLDG. MGT. SERVICES		0	19861	19,861	
7500 OTHER INT. SERVICES (A)		0	0	0	
7560 DISTRIBUTION/POSTAGE		43,500	61,200	17,700	
INTERNAL SVC. REIMBURSEMENTS		48,274	86,035	37,761	
TOTAL MATERIAL/SERVICES		115,100	149,135	34,035	
8100 LAND (C)		0	0	0	
8200 BUILDINGS (C)		0	0	0	
8300 OTHER IMPROVEMENTS (A)		0	0	0	
8400 EQUIPMENT (A)		20,000	11,000	(9,000)	
CAPITAL OUTLAY		20,000	11,000	(9,000)	
DIRECT BUDGET		283,915	314,995	31,080	
TOTAL BUDGET		386,549	456,759	70,210	

(A) - Always describe and explain on BUD 3.

(B) - Describe and explain on BUD 3 when change (+ or -) 25%.

(C) - Do not describe.

BUD 2 SUMMARY

		ORGANIZATION A & T RECORDING			DATE 1/10/94	
		FUND 100	AGENCY 030	ORGANIZATION 7575	PREPARED BY JAMES CZMOWSKI	
FTE	JOB TITLE				JOB NO.	BASE
1.0	OFFICE ASSISTANT 2				6001	22,646
1.0	Office Assistant 2				6001	24,033
1.0	Office Assistant 2				6001	20,943
1.0	Office Assistant 2				6001	24,033
1.0	Office Assistant 2				6001	21,673
1.0	Office Assistant 2				6001	20,211
1.0	Office Assistant/Sen				6002	27,812
1.0	Operations Supervisor				9025	31,163
8					TOTAL	192,514

BUD 2

PERSONNEL DETAIL			ORGANIZATION A & T RECORDING				DATE 1/10/94	
			FUND 100	AGENCY 030	ORGANIZATION 7575	PREPARED BY JAMES CZMOWSKI		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	OFFICE ASSISTANT 2	6001	Bryant, Sharon K.	22,646	5,858	2,978	31,482	
1.0	Office Assistant 2	6001	Cantrell, Janette	24,033	6,217	3,373	33,623	
1.0	Office Assistant 2	6001	Young, Carol	20,943	5,417	4,877	31,237	
1.0	Office Assistant 2	6001	Wyatt, Maureen E.	24,033	6,217	6,973	37,223	
1.0	Office Assistant 2	6001	Betz, Nancy	21,673	5,606	6,741	34,020	
1.0	Office Assistant 2	6001	Vacant	20,211	5,228	4,647	30,087	
1.0	Office Assistant/Sen	6002	Walker, Nancy J.	27,812	7,194	7,135	42,141	
1.0	Operations Supervisor	9025	Swick, Cindy	31,163	8,061	7,745	46,969	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM			PERMANENT	5100	49,798	44,469	286,782	
				192,514				
			TEMPORARY	5200	265	98	3,389	
				3,025				
			OVERTIME	5300	0	0	0	
				0				
			PREMIUM	5400	1,293	162	6,455	
	5,000							
			TOTAL	200,539	5500	5550	296,625	
				200,539	51,356	44,729	296,625	

BUD 2a

TEMP, O'TIME & PREMIUM DETAIL LGFS CODES	ORGANIZATION NAME A & T Recording			DATE PREPARED 01-10-94	
	FUND 100	AGENCY 30	ORG 7575	PREPARED BY James Czmowski	

TEMPORARY EMPLOYEES Explanation (Description, Job Class, etc.)	HOURS	RATE	5200 BASE	5500 FRINGE	5550 INSUR
Vacation coverage OA11 work coverage 330 hours at 9.16	330	9.16	3,025	265	98
TOTALS (TRANSFER TO BUD 2)			3,025	265	98

OVERTIME PAY Explanation (Description, Job Class, etc.)	O'TIME HOURS	O'TIME RATE	5300 BASE	5500 FRINGE	5550 INSUR
TOTALS (TRANSFER TO BUD 2)			0	0	0

PREMIUM PAY Explanation (Description, Job Class, etc.)	PREM HOURS	PREM RATE	5400 BASE	5500 FRINGE	5550 INSUR
Vacation coverage Out of class pay supervisors vacation			5,000	1,293	162
TOTALS (TRANSFER TO BUD 2)			5,000	1,293	162

ie2a7575

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDING	PREPARED BY JAMES CZMOWSKI
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION	DATE
5100	PERMANENT	Eight permanent employees This increase is do to an ever increasing work load	\$192,514
5200	TEMPORARY	Estimate 330 hours of Seasonal help for vacation coverage.	\$3,025
5300	OVERTIME		\$0
5400	PREMIUM PAY	Out of class pay during supervisors vacation.	\$5,000

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDING			PREPARED BY JAMES CZMOWSKI	
		FUND 100	AGENCY 030	ORGANIZATION 7575	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6110	PROFESSIONAL SERVICES				\$0	
6120	PRINTING AND REPRODUCTION				\$35,820	
	A) Copy of all recorded documents 540,000 pages @ \$0.04 each				\$21,600	
	B) Document seals to certify act of recording				\$4,680	
	C) Forms such as envelopes, etc.				\$9,540	
6140	COMMUNICATIONS				\$0	
6170	RENTALS				\$3,600	
	A) Copy Machine				\$3,600	
6180	REPAIRS & MAINTENANCE Microfilm equipment, stamps, etc.				\$5,000	
6190	MAINTENANCE CONTRACTS				\$3,500	
	A) Tec cash register				\$300	
	B) Minolta microfilm reader/printer				\$1,200	
	C) 3-M microfilm reader/printer				\$1,500	
	D) Canon #210 copy machine				\$500	
6200	POSTAGE (see 7560)				\$0	
6230	SUPPLIES				\$12,900	
	A) 16mm microfilm				\$1,400	
	B) Microfilm printer paper, etc.				\$4,500	
	C) Xerographic paper and toner				\$3,500	
	D) Office supplies (numerical stamps, etc.)				\$3,500	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDING	PREPARED BY JAMES CZMOWSKI
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION 100 100 7575	DATE 1/4/94
6310	EDUCATION & TRAINING		\$1,900
	A) County Clerk's State Convention 2 persons (registration,Travel,Lodging&Per Diem)		ITEM TOT. \$1,000
	B) County Clerk's Mid Winter Conference 2 persons (Registration,Travel,Lodging & Per Diem)		\$900

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDING			PREPARED BY JAMES CZMOWSKI	
		FUND 100	AGENCY 030	ORGANIZATION 7575	DATE 1/4/94	
OBJECT CODE	EXPLANATION				AMOUNT	
6330	LOCAL TRAVEL AND MILEAGE Tri-Met Bus Pass (1) Mileage (local committee mtgs) \$200.				ITEM TOT. \$380 \$180 \$200	

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDING			PREPARED BY JAMES CZMOWSKI	
		FUND	AGENCY	ORGANIZATION	DATE	
		100	030	7575	1/10/94	
OBJECT CODE	EXPLANATION	NUM.	EA.	ITEM TOT.	AMOUNT	
7150	TELEPHONE					
	Voice Mail	1	\$51	\$51	\$4,974	
	Multi Line	7	\$220	\$1,540		
	2500	2	\$124	\$248		
	Speaker Phone	0	\$0	\$0		
	Long Distance	1	\$309	\$309		
	Code-a-phone	1	\$438	\$438		
	Directories	7	\$4	\$28		
	DID No. 3034, 3037	2	\$320	\$640		
	DN No. 2037,2036,2739,2034,6639 No. 2748, 2910, 2741, 6578, 6726	10	\$172	\$1,720		
7200	DATA PROCESSING SERVICES					
7300	MOTOR POOL SERVICES					
7400	BUILDING MGT. SERVICES - LEASE SPACE FOR RECORDING				19,861	
7500	OTHER INTERNAL SERVICES					
7560	DISTRIBUTION/POSTAGE				\$61,200	
	Mailing of recorded documents back to requestor. (This is up from last year due to more that must be mailed back)					

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T RECORDING	PREPARED BY JAMES CZMOWSKI
OBJECT CODE	EXPLANATION	FUND AGENCY ORGANIZATION 100 030 7575	DATE 1/4/94
8300	OTHER IMPROVEMENTS		
8400	EQUIPMENT - ONE MICROFILM READER/PRINTER (To replace old equipment used by the public for copies of) (recorded deeds, contracts, etc.)		\$11,000

BUD 3a

CONTRACTS		ORGANIZATION NAME A & T RECORDING			PREPARED BY JAMES CZMOWSKI	
		FUND 100	AGENCY 030	ORGANIZATION 7575	DATE 1/4/94	
OBJECT CODE	CONTRACT DESCRIPTION	CONTACT PERSON		ESTIMATED AWARD	TYPE	AMOUNT
6190	Tec Cash Register	C. Swick		09/91	Mnt	\$300
	Minolta Microfilm R/P	C. Swick		07/91	Mnt	\$1,200
	Three-M Microfilm R/P	C. Swick		07/91	Mnt	\$1,500
	Canon #210 Copier	C. Swick		07/91	Mnt	\$500

License / Passport

BUD 1

BUDGET REQUEST	AGENCY DES	ORGANIZATION A & T LICENSES & PASSPORTS		PREPARED BY KATHY TUNEBERG	
	LGFS CODE	FUND	AGENCY	ORGANIZATION	DATE
		100	030	7635	02/01/94 BUD94LL.wk3
OBJECT DETAIL		CURRENT BUDGET 93-94	BUDGET REQUEST 94-95	NET DIFF	
5100 PERMANENT		64,816	64,092	(724)	
5200 TEMPORARY				0	
5300 OVERTIME				0	
5400 PREMIUM PAY				0	
5500 FRINGE		17,461	16,580	(882)	
DIRECT PERSONAL SERVICES		82,277	80,672	(1,606)	
5550 INS BENEFITS		12,698	11,979	(719)	
PERSONAL SERVICES		94,976	92,651	(2,325)	
6050 COUNTY SUPPLEMENTS				0	
6060 PASS THROUGH PAYMENTS				0	
6110 PROFESSIONAL SERVICES		0	0	0	
6120 PRINTING		6,000	6,000	0	
6130 UTILITIES				0	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS (SPACE RENTAL TO 7400)		5,757	300	(5,457)	
6180 REPAIRS & MAINTENANCE		100	100	0	
6190 MAINTENANCE CONTRACTS		1,200	1,200	0	
6200 POSTAGE		0	0	0	
6230 SUPPLIES		450	450	0	
6270 FOOD				0	
6310 EDUCATION & TRAINING		0	0	0	
6330 TRAVEL				0	
6520 INSURANCE				0	
6530 EXTERNAL DATA PROCESSING				0	
6550 DRUGS				0	
6580 CLAIMS PAID				0	
6590 JUDGEMENTS				0	
6610 AWARDS & PREMIUMS				0	
6620 DUES & SUBSCRIPTIONS				0	
7810 DEBT RETIREMENT				0	
7820 INTEREST				0	
DIRECT MATERIALS AND SERVICES		13,507	8,050	(5,457)	
7100 INDIRECT COSTS				0	
7150 TELEPHONE		1,985	2,005	20	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		0	0	0	
7400 BLDG. MGT. SERVICES		0	8609	8,609	
7500 OTHER INT. SERVICES		0	0	0	
7560 DISTRIBUTION/POSTAGE		50	50	0	
INTERNAL SVC. REIMBURSEMENTS		2,035	10,664	8,629	
TOTAL MATERIAL/SERVICES		15,542	18,714	3,172	
8100 LAND				0	
8200 BUILDINGS				0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		0	500	500	
CAPITAL OUTLAY		0	500	500	
	DIRECT BUDGET	95,784	88,722	(7,063)	
	TOTAL BUDGET	110,518	111,865	1,347	

ORGANIZATION
A & T LICENSES & PASSPORTS

DATE
02/01/94

FUND AGENCY ORGANIZATION
100 030 7635

PREPARED BY
KATHY TUNEBERG

FTE	JOB TITLE	JOB NO.	BASE
1.5	OFFICE ASSISTANT 2	6001	30,881
1.0	PROGRAM COORDINATOR	6022	33,211
2.5		TOTAL	64,092

BUD 2

PERSONNEL DETAIL			ORGANIZATION A & T LICENSES & PASSPORTS				DATE 02/01/94	
			FUND 100	AGENCY 030	ORGANIZATION 7635	PREPARED BY KATHY TUNEBERG		
FTE	JOB TITLE	JOB NO.	NAME	BASE	FRINGE		TOTAL	
					DIR	IND		
1.0	OFFICE ASSISTANT 2	6001	BUCKMASTER, PAM	20,201	5,226	4,158	29,585	
1.0	PROGRAM COORDINATOR	6022	SWAIN, SAVANA	33,211	8,591	5,374	47,176	
0.5	OFFICE ASSISTANT 2	6001	GRENFELL, WANDA	10,680	2,763	2,447	15,890	
NOTE: FIGURES IN SHADED BOXES WILL TRANSFER TO CORRESPONDING LINE NUMBERS ON THE BUD 1 FORM			PERMANENT	5100	16,580	11,979	92,651	
				64,092				
			TEMPORARY	5200				
			OVERTIME	5300				
			PREMIUM	5400				
			TOTAL		64,092	16,580	11,979	92,651

OBJECT DETAIL		ORGANIZATION NAME A & T LICENSES & PASSPORTS		PREPARED BY KATHY TUNEBERG
		FUND 100	AGENCY 030	ORGANIZATION 7635
OBJECT CODE	EXPLANATION			AMOUNT
5100	PERMANENT 2.5 FTE (Program Coordinator & 1.5 OA2's)			64,092

BUD 3

OBJECT DETAIL	ORGANIZATION NAME A & T LICENSES & PASSPORTS			PREPARED BY KATHY TUNEBERG
	FUND 100	AGENCY 030	ORGANIZATION 7635	DATE 12/27/93

OBJECT CODE	EXPLANATION	AMOUNT
6120	PRINTING AND REPRODUCTION Marriage License Certificate Forms	\$6,000
6170	RENTAL Building space lease (to 7400 bldg mgt)	0
	Copier - prorated share	300
6180	REPAIRS & MAINTENANCE Misc. Machine Repair	100
6190	MAINTENANCE CONTRACTS Cash Register @	250
	(SEE BUD 3A DETAIL) Microfilm @	950
6200	POSTAGE (see 7560)	\$0
6230	OFFICE SUPPLIES	\$450

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T LICENSES & PASSPORTS			PREPARED BY KATHY TUNEBERG	
OBJECT CODE	EXPLANATION	FUND	AGENCY	ORGANIZATION	DATE	AMOUNT
7150	TELEPHONES	100	030	7635	1/10/94	\$2,005
				QTY.	EA.	ITEM TOT.
	SL1			1	\$213	\$213
	2500			1	\$120	\$120
	DID LINES (x3523, x3027, x3800)			3	\$310	\$930
	DN LINES (x2800, x2027)			2	\$172	\$344
	County Directories			2	\$4	\$8
	Move charge			1	\$150	\$150
	Long Distance			1	\$26	\$26
	Code a Phone			2	\$52	\$104
	Other Equipment Access: two jack charge—code a phone					\$110
7400	BLDG. MGT. SERVICES – SPACE LEASE					\$8,609
7560	DISTRIBUTION/POSTAGE					\$50

BUD 3

OBJECT DETAIL		ORGANIZATION NAME A & T LICENSES & PASSPORTS			PREPARED BY KATHY TUNEBERG	
		FUND 100	AGENCY 030	ORGANIZATION 7635	DATE 12/27/93	
OBJECT CODE	EXPLANATION				AMOUNT	
8300	OTHER IMPROVEMENTS				\$	0
8400	EQUIPMENT CASH REGISTER					500

BUD 3a

CONTRACTS		ORGANIZATION NAME A & T LICENSES & PASSPORTS			PREPARED BY KATHY TUNEBERG	
		FUND 100	AGENCY 030	ORGANIZATION 7635	DATE 12/27/93	
OBJECT CODE	CONTRACT DESCRIPTION	CONTACT PERSON		ESTIMATED AWARD	TYPE	AMOUNT
6190	Maintenance Contract: Sweda Cash Register	K. Tuneberg			MNT	250
	Maintenance Contract: Microfilm Reader/Printer	K. Tuneberg			MNT	950

Revenue

REVENUE SOURCE: MARRIAGE LICENSE FEES

REVENUE CODE:

3021

Organization: 7635

Fund: 100 _____

Dept: 030 _____

Division: 7060 _____

Revenue Category: 30

Revenue Class: 300

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$150,000
1993-94 Revised:	\$150,000
1993-94 Projected:	\$150,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$150,000
1994-95 Carryover: _____ (Fill out #2 & 3 below.)	
1994-95 Total:	\$150,000

1. Show computation used to arrive at estimate.

6,000 Licenses @ \$25 = \$150,000

\$60 per license - \$25 County General Fund ORS 205.320
 \$25 Domestic Violence (State)
 \$10 Family Services Program

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: MISCELLANEOUS LICENSE FEE

REVENUE CODE:

3040

Organization: 7635

Fund: 100 _____
Dept: 030 _____
Division: 7060 _____

Revenue Category: 30

Revenue Class: 300

Contact: K. TUNEBERG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$16,000
1993-94 Revised:	_____
1993-94 Projected:	\$16,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$16,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$16,000

1. Show computation used to arrive at estimate.

Expect collection level to be the same as in the past.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: PASSPORT APPLICATION FEES

REVENUE CODE: 4700

Organization: 7635

Fund: 100
Dept: 030
Division: 7060

Revenue Category: 40

Revenue Class: 470

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$22,000
1993-94 Revised:	\$22,000
1993-94 Projected:	\$22,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$23,000
1994-95 Carryover: _____ (Fill out #2 & 3 below.)	
1994-95 Total:	\$23,000

1. Show computation used to arrive at estimate.

Small increase in applications, expect to process 2,300 in 1994-95.

$$2,300 @ \$10 = \$23,000$$

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

Number of passport applications have increased the last two years.

REVENUE SOURCE: **RECORDING FEE**REVENUE CODE: **4703**

Organization: 7575

Fund: 100

Dept: 030

Division: 7060

Revenue Category: 40

Revenue Class: 470

Contact: J. CZMOWSKI

Telephone Number: 248-3376

1993-94 Adopted:	\$1,500,000
1993-94 Revised:	_____
1993-94 Projected:	\$1,500,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$2,000,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$2,000,000

1. Show computation used to arrive at estimate.

$$400,000 @ \$5 = \$2,000,000$$

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

Expect an increase in number of recorded documents, due to low interest rates.

REVENUE SOURCE: **STREET VACATION FEE**

REVENUE CODE: **4730**

Organization: 7570

Fund: 100
Dept: 030
Division: 7060

Revenue Category: 40
Revenue Class: 470

Contact: J. CZMOWSKI

Telephone Number:248-3376

1993-94 Adopted:	\$300
1993-94 Revised:	_____
1993-94 Projected:	\$300
1994-95 Estimated: (Fill out #1 & 3 below.)	\$300
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$300

1. Show computation used to arrive at estimate.

Expect one petition to vacate @ \$300

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: ASSESSMENT & TAXATION SUPPLEMENT (DOR)

REVENUE CODE:

2369

Organization: 7630

Fund: 175 _____
Dept: 030 _____
Division: 7060 _____Revenue Category: 20
Revenue Class: 230

Contact: K. TUNEBERG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$2,250,000
1993-94 Revised:	_____
1993-94 Projected:	\$2,250,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$2,376,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$2,376,000

1. Show computation used to arrive at estimate.

Budget Office supplied estimate based on State DOR reimbursement and distribution structure.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1993-94. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

Numbers per latest DOR estimate.

REVENUE SOURCE: MISCELLANEOUS A & T FEES

REVENUE CODE: 4702

Organization: 7630

Fund: 175 _____

Dept: 030 _____

Division: 7060 _____

Revenue Category: 40

Revenue Class: 470

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$154,000
1993-94 Revised:	_____
1993-94 Projected:	\$154,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$161,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$161,000

1. Show computation used to arrive at estimate.

Copies of Maps	\$5,000
1333 Warrants @ \$15	20,000
300 NSF Checks @ \$20	6,000
Estimate of 5% charge	<u>130,000</u>
Total	161,000

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: MISCELLANEOUS A & T FEES

REVENUE CODE: 4702

Organization: 7570

Fund: 175 _____

Dept: 030 _____

Division: 7060 _____

Revenue Category: 40

Revenue Class: 470

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$22,000
1993-94 Revised:	_____
1993-94 Projected:	\$22,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$24,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$24,000

1. Show computation used to arrive at estimate.

Microfiche Sales	<u>\$ 24,000</u>
	\$ 24,000

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: TAX STATEMENT FEE

REVENUE CODE:

4706

Organization: 7630

Fund: 175 _____

Dept: 030 _____

Division: 7060 _____

Revenue Category: 40

Revenue Class: 470

Contact: K. TUNEBERG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$276,000
1993-94 Revised:	\$276,000
1993-94 Projected:	\$276,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$280,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$280,000

1. Show computation used to arrive at estimate.

$$93,300 \times \$3 = \$280,000$$

Estimate based on actual fees collected in 1993-94.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: MORTGAGE COMPANY REIMBURSEMENT

REVENUE CODE: 4714

Organization: 7635

Fund: 175 _____
Dept: 030 _____
Division: 7060 _____Revenue Category: 40
Revenue Class: 470

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$21,000
1993-94 Revised:	_____
1993-94 Projected:	\$21,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$0
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$0

1. Show computation used to arrive at estimate.
2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.
3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

In the last legislative session this reimbursement was done away with.

REVENUE SOURCE: FORECLOSURE TITLE SEARCH FEE

REVENUE CODE:

4715

Organization: 7630

Fund: 175

Dept: 030

Division: 7060

Revenue Category: 40

Revenue Class: 470

Contact: K. TUNEBCRG

Telephone Number: 248-3330

1993-94 Adopted:	\$12,500
1993-94 Revised:	_____
1993-94 Projected:	\$12,500
1994-95 Estimated: (Fill out #1 & 3 below.)	\$12,500
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$12,500

1. Show computation used to arrive at estimate.

Approximately 250 accounts will proceed to redemption in 1994-95.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1992-93 Projected and 1994-95 Estimated.

REVENUE SOURCE: WARRANT SATISFACTION FEE

REVENUE CODE: 4716

Organization: 7630

Fund: 175

Dept: 030

Division: 7060

Revenue Category: 40

Revenue Class: 470

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$13,000
1993-94 Revised:	_____
1993-94 Projected:	\$13,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$13,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$13,000

1. Show computation used to arrive at estimate.

Estimate 650 @ \$20 = \$13,000

ORS 311.635

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: DEPARTMENT OF REVENUE FEE

REVENUE CODE: 4720

Organization: 7575

Fund: 175

Dept: 030

Division: 7060

Revenue Category: 40

Revenue Class: 470

Contact: J. CZMOWSKI

Telephone Number: 248-3376

1993-94 Adopted:	\$30,000
1993-94 Revised:	_____
1993-94 Projected:	\$30,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$50,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$50,000

1. Show computation used to arrive at estimate.

County's share of fee imposed on certain recorded documents per HB2338

50,000 @ \$1 = \$50,000

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

Expect more documents due to the lower interest rates.

REVENUE SOURCE: ASSESSOR SALES

REVENUE CODE: 6006

Organization: 7630

Fund: 175 _____
Dept: 030 _____
Division: 7060 _____Revenue Category: 60
Revenue Class: 600

Contact: K. TUNEBERG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$19,000
1993-94 Revised:	_____
1993-94 Projected:	\$19,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$19,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$19,000

1. Show computation used to arrive at estimate.

Revenue depends on volume of request or usage of copy machines.
Usually 50% of collection occurs half way through the year.

YTD Revenue at 10-31-93 was \$ 6,047.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

Bud 4 Revenue Spreadsheet

Fund - Summary
 Agency - 030
 Division - Assessment & Taxation

Revenue Source		Program Name	Board of Equalization	Admin	Tech Support	A&T Records Management	A&T Recording	Appraisal Comm/Indust	Appraisal Personal Prop	Appraisal Residential	Appraisal Support/Expt	A&T Tax Collection	Marriage Licenses	Rev Source Totals
Code	Name	Program Org #	7390	7565	7566	7570	7575	7590	7600	7610	7620 & 7685	7630	7635	
2369	Assessment & Taxation Supplement (DOR)		0	0	0	0	0	0	0	0	0	2,376,000	0	2,376,000
3021	Marriage License Fees		0	0	0	0	0	0	0	0	0	0	150,000	150,000
3040	Miscellaneous License Fees		0	0	0	0	0	0	0	0	0	0	16,000	16,000
4700	Passport Application Fees		0	0	0	0	0	0	0	0	0	0	23,000	23,000
4702	Miscellaneous A&T Fees		0	0	0	24,000	0	0	0	0	0	0	0	24,000
4703	Recording Fee		0	0	0	0	2,000,000	0	0	0	0	161,000	0	185,000
4706	Tax Statement Fee		0	0	0	0	0	0	0	0	0	0	0	2,000,000
4713	Corner Conservation Fee		0	0	0	0	0	0	0	0	0	280,000	0	280,000
4714	Mortgage Company Reimbursement		0	0	0	0	0	0	0	0	0	0	0	0
4715	Foreclosure Title Search Fee		0	0	0	0	0	0	0	0	0	0	0	0
4716	Warrant Satisfaction Fee		0	0	0	0	0	0	0	0	12,500	0	0	12,500
4720	Department of Revenue Fee		0	0	0	0	50,000	0	0	0	13,000	0	0	13,000
4730	Street Vacation Fee		0	0	0	300	0	0	0	0	0	0	0	300
6006	Assessor Sales		0	0	0	0	0	0	0	0	0	19,000	0	19,000
Total Program Revenues			0	0	0	24,300	2,050,000	0	0	0	0	2,861,500	189,000	5,124,800
General Fund Subsidy			0	0	0	0	0	0	0	0	0	0	0	0
General Fund Indirect			0	0	0	0	0	0	0	0	0	0	0	0
General Fund Match			0	0	0	0	0	0	0	0	0	0	0	0
7601	Total General Fund		217,403	292,933	2,248,251	1,266,071	(1,593,241)	1,454,397	529,817	1,710,222	1,129,952	(1,306,928)	(77,135)	5,871,742
Total Revenues			217,403	292,933	2,248,251	1,290,371	456,759	1,454,397	529,817	1,710,222	1,129,952	1,554,572	111,865	10,996,542
Total Expenditures			217,403	292,933	2,248,251	1,290,371	456,759	1,454,397	529,817	1,710,222	1,129,952	1,554,572	111,865	10,996,542

Bud 4 Revenue Spreadsheet

Fund 100
 Agency 030 & 021
 Division: Assessment & Taxation

Revenue Source		Program Name	Board of Equalization	Admin	Tech Support	A&T Records Management	A&T Recording	Appraisal Comm/Indust	Appraisal Personal Prop	Appraisal Residential	Appraisal Support/Expt	A&T Tax Collection	Marriage Licenses	Rev Source Totals
Code	Name	Program Org #	7390	7565	7566	7570	7575	7590	7600	7610	7620 & 7685	7630	7635	Totals
2369	Assessment & Taxation Supplement (DOR)													0
3021	Marriage License Fees												150,000	150,000
3040	Miscellaneous License Fees												16,000	16,000
4700	Passport Application Fees												23,000	23,000
4702	Miscellaneous A&T Fees													0
4703	Recording Fee						2,000,000							2,000,000
4706	Tax Statement Fee													0
4713	Corner Conservation Fee							0						0
4714	Mortgage Company Reimbursement													0
4715	Foreclosure Title Search Fee													0
4716	Warrant Satisfaction Fee													0
4720	Department of Revenue Fee													0
4730	Street Vacation Fee													0
6006	Assessor Sales					300								300
	Total Program Revenues					300	2,000,000					0	189,000	2,189,300
	General Fund Subsidy													0
	General Fund Indirect													0
	General Fund Match													0
7601	Total General Fund		0	0	0	(300)	(1,543,241)	0	0	0	0	0	(77,135)	(1,620,676)
	Total Revenues:		0	0	0	0	456,759	0	0	0	0	0	111,865	568,624
	Total Expenditures		0	0	0	0	456,759	0	0	0	0	0	111,865	568,624

Bud 4 Revenue Spreadsheet

Fund 175
 Agency 030
 Division: Assessment & Taxation

Revenue Source		Program Name	Board of Equalization	Admin	Tech Support	A&T Records Management	A&T Recording	Appraisal Comm/Indust	Appraisal Personal Prop	Appraisal Residential	Appraisal Support/Expt	A&T Tax Collection	Marriage Licenses	Rev Source
Code	Name	Program Org #	7390	7565	7566	7570	7575	7590	7600	7610	7620 & 7685	7630	7635	Totals
2369	Assessment & Taxation Supplement (DOR)											2,376,000		2,376,000
3021	Marriage License Fees													0
3040	Miscellaneous License Fees													0
4700	Passport Application Fees													0
4702	Miscellaneous A&T Fees					24,000						161,000		185,000
4703	Recording Fee													0
4706	Tax Statement Fee											280,000		280,000
4713	Corner Conservation Fee													0
4714	Mortgage Company Reimbursement												0	0
4715	Foreclosure Title Search Fee											12,500		12,500
4716	Warrant Satisfaction Fee											13,000		13,000
4720	Department of Revenue Fee						50,000							50,000
4730	Street Vacation Fee													0
6006	Assessor Sales											19,000		19,000
Total Program Revenues			0	0	0	24,000	50,000	0	0	0	0	2,861,500	0	2,935,500
General Fund Subsidy														
General Fund Indirect														
General Fund Match														
7601	Total General Fund		217,403	292,933	2,248,251	1,266,371	(50,000)	1,454,397	529,817	1,710,222	1,129,952	(1,306,928)	0	7,492,418
Total Revenues			217,403	292,933	2,248,251	1,290,371	0	1,454,397	529,817	1,710,222	1,129,952	1,554,572	0	10,427,918
Total Expenditures			217,403	292,933	2,248,251	1,290,371	0	1,454,397	529,817	1,710,222	1,129,952	1,554,572	0	10,427,918

Tax Title Found
158

BUD 1

BUDGET REQUEST	AGENCY DGS LGFS CODE	ORGANIZATION TAX TITLE FUND		PREPARED BY CAL SMITH	
		FUND	AGENCY	ORGANIZATION	DATE
		158	030	A & T	02/03/94 BUD94REV.WK3
OBJECT DETAIL		CURRENT BUDGET 93-94	REQUEST BUDGET 94-95	NET DIFF	
5100 PERMANENT		0	0	0	
5200 TEMPORARY		0	0	0	
5300 OVERTIME		0	0	0	
5400 PREMIUM PAY		0	0	0	
5500 FRINGE		0	0	0	
DIRECT PERSONAL SERVICES		0	0	0	
5550 INS BENEFITS		0	0	0	
PERSONAL SERVICES		0	0	0	
6050 COUNTY SUPPLEMENTS		0	0	0	
6060 PASS THROUGH PAYMENTS		1,687,212	1,356,044	(331,168)	
6110 PROFESSIONAL SERVICES		0	0	0	
6120 PRINTING		0	0	0	
6130 UTILITIES		0	0	0	
6140 COMMUNICATIONS		0	0	0	
6170 RENTALS		0	0	0	
6180 REPAIRS & MAINTENANCE		0	0	0	
6190 MAINTENANCE CONTRACTS		0	0	0	
6200 POSTAGE (See 7560)		0	0	0	
6230 SUPPLIES		0	0	0	
6270 FOOD		0	0	0	
6310 EDUCATION & TRAINING		0	0	0	
6330 TRAVEL		0	0	0	
6520 INSURANCE		0	0	0	
6530 EXTERNAL DATA PROCESSING		0	0	0	
6550 DRUGS		0	0	0	
6580 CLAIMS PAID		0	0	0	
6590 JUDGEMENTS		0	0	0	
6610 AWARDS & PREMIUMS		0	0	0	
6620 DUES & SUBSCRIPTIONS		0	0	0	
7810 DEBT RETIREMENT		0	0	0	
7820 INTEREST		0	0	0	
DIRECT MATERIALS AND SERVICES		1,687,212	1,356,044	(331,168)	
7100 INDIRECT COSTS(at .0352 of PER, M&S,7xxx)		0	0	0	
7150 TELEPHONE		0	0	0	
7200 DATA PROC SERVICES		0	0	0	
7300 MOTOR POOL SERVICES		0	0	0	
7400 BLDG. MGT. SERVICES		0	0	0	
7500 OTHER INT. SERVICES		449,038	771,206	322,168	
7560 DISTRIBUTION/POSTAGE		0	0	0	
INTERNAL SVC. REIMBURSEMENTS		449,038	771,206	322,168	
TOTAL MATERIAL/SERVICES		2,136,250	2,127,250	(9,000)	
8100 LAND		0	0	0	
8200 BUILDINGS		0	0	0	
8300 OTHER IMPROVEMENTS		0	0	0	
8400 EQUIPMENT		0	0	0	
CAPITAL OUTLAY		0	0	0	
	DIRECT BUDGET	1,687,212	1,356,044	(331,168)	
	TOTAL BUDGET	2,136,250	2,127,250	(9,000)	

REVENUE SOURCE: SALES OF FORECLOSED PROPERTIES

REVENUE CODE: 1050

Organization: 5655
TAX TITLE

Fund: 175
Dept: 030
Division: 7060

Revenue Category: OTHER
Revenue Class: SALES

Contact: K. TUNEBERG

Telephone Number:248-3330

1993-94 Adopted:	\$1,850,000
1993-94 Revised:	_____
1993-94 Projected:	\$1,850,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$1,850,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$1,850,000

1. Show computation used to arrive at estimate.

Based on last year.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1993-94. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: **PORTLAND REIMBURSEMENT**

REVENUE CODE: **2773**

Organization: 5655
TAX TITLE

Fund: 175
Dept: 030
Division: 7060

Revenue Category: OTHER
Revenue Class: SERVICE REIMB

Contact: K. TUNEBCRG _____

Telephone Number:248-3330

1993-94 Adopted:	\$17,500
1993-94 Revised:	_____
1993-94 Projected:	\$17,500
1994-95 Estimated: (Fill out #1 & 3 below.)	\$17,500
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$17,500

1. Show computation used to arrive at estimate.

BASED ON LAST YEAR.

10% OF SALES OF PROPERTIES IN PORTLAND COVER BY CITY COUNTY AGREEMENT.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1993-94. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: **GRESHAM REIMBURSEMENT**

REVENUE CODE: **2773**

Organization: 5655
TAX TITLE

Fund: 175 _____
Dept: 030 _____
Division: 7060 _____

Revenue Category: OTHER
Revenue Class: SERVICE REIMB

Contact: K. TUNEBERG _____

Telephone Number:248-3330

1993-94 Adopted:	\$750
1993-94 Revised:	_____
1993-94 Projected:	\$750
1994-95 Estimated: (Fill out #1 & 3 below.)	\$750
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$750

1. Show computation used to arrive at estimate.

BASED ON LAST YEAR

10% OF SALES OF PROPERTIES IN GRESHAM COVERED BY CITY COUNTY AGREEMENT

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1993-94. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: INTEREST ON INVESTMENTS

REVENUE CODE: 5000

Organization: 5655
TAX TITLE

Fund: 175 _____
Dept: 030 _____
Division: 7060 _____

Revenue Category: INTEREST
Revenue Class: INTEREST

Contact: K. TUNEBERG _____

Telephone Number:248-3330

1993-94 Adopted:	\$18,000
1993-94 Revised:	_____
1993-94 Projected:	\$18,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$9,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$9,000

1. Show computation used to arrive at estimate.

INTEREST OF 3% ON INVESTMENT OF 300,000.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1993-94. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

INTEREST RATE LAST YEAR WAS 6%

REVENUE SOURCE: INTEREST ON CHARGES

REVENUE CODE: 5010

Organization: 5655
TAX TITLE

Fund: 175 _____
Dept: 030 _____
Division: 7060 _____

Revenue Category: INTEREST
Revenue Class: INTEREST

Contact: K. TUNEBERG _____

Telephone Number:248-3330

1993-94 Adopted:	\$250,000
1993-94 Revised:	_____
1993-94 Projected:	\$250,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$250,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$250,000

1. Show computation used to arrive at estimate.

BASED ON LAST YEAR.

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1993-94. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: MARRIAGE LICENSE FEE (CONCILIATION SERVICES) REVENUE CODE: 3021

Organization: 2801

Fund: 180 _____

Dept: 021 _____

Division: 2130 _____

Revenue Category: 30

Revenue Class: 300

Contact: K. TUNEBCRG _____

Telephone Number: 248-3330

1993-94 Adopted:	\$60,000
1993-94 Revised:	\$60,000
1993-94 Projected:	\$60,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$60,000
1994-95 Carryover: _____ (Fill out #2 & 3 below.)	
1994-95 Total:	\$60,000

1. Show computation used to arrive at estimate.

6,000 licenses @ \$10 = \$60,000

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

REVENUE SOURCE: CORNER PRESERVATION FEE

REVENUE CODE: 4713

Organization: 6320

Fund: 167 _____

Dept: 030 _____

Division: 6000 _____

Revenue Category: 40

Revenue Class: 470

Contact: J. CZMOWSKI _____

Telephone Number: 248-3376

1993-94 Adopted:	\$300,000
1993-94 Revised:	_____
1993-94 Projected:	\$300,000
1994-95 Estimated: (Fill out #1 & 3 below.)	\$330,000
1994-95 Carryover: (Fill out #2 & 3 below.)	_____
1994-95 Total:	\$330,000

1. Show computation used to arrive at estimate.

110,000 @ \$3. = \$330,000

2. If this is grant revenue and there is carryover from 1993-94, estimate the amount of carryover to be budgeted in 1994-95. Show computation here.

3. Explain variance between 1993-94 Projected and 1994-95 Estimated.

There has been an increase in the number of documents recorded due to lower interest rates.

MEETING DATE: FEB 17 1994

AGENDA NO: R-6

(Above space for Board Clerk's Use Only)

AGENDA PLACEMENT FORM

SUBJECT: Notice of Intent to Apply for Federal Fair Housing Month Program Funds

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR BRIEFING Date Requested: 2-17-94

Amount of Time Needed: 10 minutes

DEPARTMENT: _____ DIVISION: Children & Families Svcs

CONTACT: Lorenzo Poe/ Cecile Pitts TELEPHONE: 248-5464
BLDG/ROOM: B161/2nd

PERSON(S) MAKING PRESENTATION: Lorenzo Poe/Cecile Pitts

ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

The Children and Families Services Division request approval for application to U.S. Department of Housing and Urban Development for coordination of regional fair housing month activities.

SIGNATURES REQUIRED:

ELECTED OFFICIAL: _____

OR

DEPARTMENT MANAGER: *Lorenzo Poe* (HP)

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

bcc

MULTNOMAH COUNTY
OREGON
BOARD OF
COUNTY COMMISSIONERS
1994 FEB -8 AM 10:39



MULTNOMAH COUNTY OREGON

DEPARTMENT OF SOCIAL SERVICES
HOUSING AND COMMUNITY SERVICES DIVISION (503) 248-3339
COMMUNITY DEVELOPMENT PROGRAM OFFICE (503) 248-5000
2115 S.E. MORRISON
PORTLAND, OREGON 97214
FAX: (503) 248-3048

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

M E M O R A N D U M

TO: Board of County Commissioners

FROM: Lorenzo Poe, Director
Children and Families Services

Cecile Pitts, Director
Community Development Program

DATE: February 7, 1994

SUBJECT: Notice of Intent to Apply for the Federal Fair
Housing Month Program

- I. **Recommendation/Action Requested:** The Children and Families Services Division, Community Development Program, recommends Board of Commissioners approval of the Notice of Intent to apply for federal fair housing month program under the Fair Housing Initiatives Program (FHIP).
- II. **Background Analysis:** The Children and Families Services programs have sponsored fair housing education and outreach activities for civil rights in housing for many years. The current federal initiative will allow the county to expand the activities associated with the annual fair housing conference to include four state focus; strategic preparatory endeavors; development of fair housing month hand book resources.

The goal of the application is to further the community awareness of fair housing protection and responsibilities under federal and local law.

Special emphasis will be placed on involving the disabilities community in program planning and implementation.

The identified program partnership includes the County, the Portland Community Housing Resource Board, the Portland Housing Center, the Multi family Housing Council of Oregon, and an independent living private consultant firm.

III. Financial Impact: The proposal is designed to fund a year of planning and implementation of the fair housing month event. The identified local match is in the form of in-kind resources and private donations linked to the fair housing conference.

IV. Legal Issues:

None. If successful, the County will be required to execute an intergovernmental agreement with the federal Department of HUD to receive the funds. Further, the County will execute subcontracts with the partner agencies to carry out the program.

V. Controversial Issues: None.

VI. Link to Current County Policies:

The program is consistent with the 1992 Fair Housing Advisory Task Force Report and Recommendation in regards to improving the coordination of education and outreach programs on fair housing in our community.

VII. Citizen Participation:

The proposal is designed to engage a wide group of parties in the preparation for fair housing month events. These parties include the disability community, the housing industry, consumer advocate agencies, fair housing advocates and tenant rights advocates.

MULTNOMAH COUNTY NOTICE OF INTENT

TO: BOARD OF COUNTY COMMISSIONERS

DATE: 2-1-94

DEPARTMENT AND CONTACT PERSON: Children and Family Services/
Cecile Pitts

GRANTOR AGENCY: Federal Department of Housing and Urban
Development, Fair Housing Initiatives Program
(FHIP)

BEGINNING DATE OF GRANT: October 1, 1994

PROJECT TITLE: Fair Housing Month Education and Outreach
Activities

PROJECT DESCRIPTION/GOALS:

The US Department of Housing and Urban Development (HUD) has solicited requests for funding under its Fair Housing Initiatives Program(FHIP). Our grant proposal for National Fair Housing Month activities would incorporate community initiatives designed to highlight equal opportunity in housing. These initiatives would include: Planning and conducting the Annual Regional Fair Housing Conference to include Oregon, Washington, Idaho and Alaska; recruitment and involvement of persons with disabilities in conference events; and outreach to minority advocacy organizations on civil rights in housing from the four state area.

ESTIMATED BUDGET:	Direct/Indirect
Federal Share:	\$91,800/\$8,200 8.2%
State Share:	%
Local Share:	\$18,000/00 0%
TOTAL:	\$109,800/\$8,200 7.5%

EXPLANATION OF LOCAL SHARE: (Explain indirect costs, hard match, in-kind, etc.)

Donated funding and in-kind contributions to the annual Fair Housing Conference.

SPECIFY REPORTING AND/OR BILLING REQUIREMENTS OF GRANTOR AND WHO REPORTS: FINANCE: XX DEPARTMENT: XX. IF DEPT REPORTS, INDICATE REASONS.

Reports include financial and performance information.

GRANT DURATION AND FUTURE RATIO (INDICATE AMOUNT OF COUNTY MATCH PER YEAR): 12 Month duration, \$18,000 local match per year.

Federal grantor functions in a reimbursement policy.

PERSONNEL DETAIL (Use appropriate County classification with yearly costs)

	FULL TIME	FRINGE/INSURANCE	TOTAL
.5 FTE CD SPEC	\$36,018	\$16,427	\$52,445

(.5 costs of this classification are \$26,222.50)

EXPLAIN MATERIALS AND CAPITAL EXPENDITURES WITH TOTAL DOLLAR AMOUNTS.

M&S	\$83,577.50
CAPITAL	0.00

COMMENTS:

M&S expences include consultant costs to assist in coordinating the Fair Housing Month events with particular attention to the issues and needs of the disability community. \The budget also includes marketing the events on a four state basis (Oregon, Washington, Idaho, and Alaska) and providing travel scholarship funding.

GRANT MANAGER

[Signature] 2/7/94
Signature date

BUDGET DIVISION

[Signature] 2-8-94
Signature date

FINANCE DIVISION

[Signature] 2/7/94
Signature date

PERSONNEL DIVISION

[Signature] 2/7/94
Signature date

DEPARTMENT DIRECTOR

[Signature] (HK) 2/7
Signature date

#2

MEETING DATE: FEB 17 1994

AGENDA NO: R-7

(Above space for Board Clerk's Use Only)

AGENDA PLACEMENT FORM

SUBJECT: Notice of Intent to Apply to Federal Fair Housing Education and Outreach Activities

BOARD BRIEFING Date Requested: _____

Amount of Time Needed: _____

REGULAR BRIEFING Date Requested: 2-17-94

Amount of Time Needed: 10 minutes

DEPARTMENT: _____ DIVISION: Children & Families Svcs

CONTACT: Lorenzo Poe/Cecile Pitts TELEPHONE: 248-5464
BLDG/ROOM: B161/2nd

PERSON(S) MAKING PRESENTATION: Lorenzo Poe/Cecile Pitts

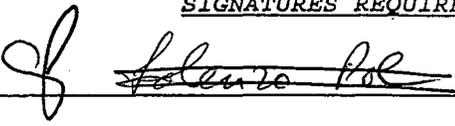
ACTION REQUESTED:

INFORMATIONAL ONLY POLICY DIRECTION APPROVAL OTHER

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

The Children and Families Services Division request approval for application to U.S. Department of Housing and Urban Development for countywide fair housing education and outreach activities.

SIGNATURES REQUIRED:

ELECTED OFFICIAL: 

OR

DEPARTMENT MANAGER: 

ALL ACCOMPANYING DOCUMENTS MUST HAVE REQUIRED SIGNATURES

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

bcc

BOARD OF COUNTY COMMISSIONERS
1994 FEB - 8 AM 10:39
MULTNOMAH COUNTY OREGON



MULTNOMAH COUNTY OREGON

DEPARTMENT OF SOCIAL SERVICES
HOUSING AND COMMUNITY SERVICES DIVISION (503) 248-3339
COMMUNITY DEVELOPMENT PROGRAM OFFICE (503) 248-5000
2115 S.E. MORRISON
PORTLAND, OREGON 97214
FAX: (503) 248-3048

BOARD OF COUNTY COMMISSIONERS
BEVERLY STEIN • CHAIR OF THE BOARD
DAN SALTZMAN • DISTRICT 1 COMMISSIONER
GARY HANSEN • DISTRICT 2 COMMISSIONER
TANYA COLLIER • DISTRICT 3 COMMISSIONER
SHARRON KELLEY • DISTRICT 4 COMMISSIONER

M E M O R A N D U M

TO: Board of County Commissioners*

FROM: Lorenzo Poe, Director
Children and Families Services

Cecile Pitts, Director
Community Development Program

DATE: February 7, 1994

SUBJECT: Notice of Intent to Apply for the Federal Fair
Housing Education and Outreach Activities

- I. Recommendation/Action Requested:** The Children and Families Services Division, Community Development Program, recommends Board of Commissioners approval of the Notice of Intent to apply for federal fair housing education and outreach activities under the Fair Housing Initiatives Program (FHIP) for local/community programs.
- II. Background Analysis:** The Children and Families Services programs have sponsored fair housing education and outreach activities for civil rights in housing for many years. The current federal initiative will allow the county to expand the activities to include planning and conducting workshops, outreach to special populations regarding housing rights and production of informational materials.

The goal of the application is to further the community awareness of fair housing protection and responsibilities under federal and local law.

Special emphasis will be placed on involving the disabilities community in program planning and implementation.

The identified program partnership includes the County, the Portland Community Housing Resource Board, the Portland Housing Center, the Multi family Housing Council of Oregon.

III. Financial Impact: The proposal is designed to fund a 12-18 month program of education and outreach activities. The identified local match is in the form of in-kind resources and private donations linked to the fair housing conference.

IV. Legal Issues:

None. If successful, the County will be required to execute an intergovernmental agreement with the federal Department of HUD to receive the funds. Further, the County will execute subcontracts with the partner agencies to carry out the program.

V. Controversial Issues: None.

VI. Link to Current County Policies:

The program is consistent with the 1992 Fair Housing Advisory Task Force Report and Recommendation in regards to improving the coordination of education and outreach programs on fair housing in our community.

VII. Citizen Participation:

The proposal is designed to engage a wide group of parties in the preparation for fair housing month events. These parties include the disability community, the housing industry, consumer advocate agencies, fair housing advocates and tenant rights advocates.

MULTNOMAH COUNTY NOTICE OF INTENT

TO: BOARD OF COUNTY COMMISSIONERS

DATE: 2-1-94

DEPARTMENT AND CONTACT PERSON: Children and Family Services/
Cecile Pitts

GRANTOR AGENCY: Federal Department of Housing and Urban
Development, Fair Housing Initiatives Program
(FHIP) Regional/Local/Community-based Program

BEGINNING DATE OF GRANT: October 1, 1994

PROJECT TITLE: Community-based Fair Housing Education and Outreach
Activities

PROJECT DESCRIPTION/GOALS:

The US Department of Housing and Urban Development (HUD) has solicited requests for funding under its Fair Housing Initiatives Program (FHIP). Our grant proposal for Regional/Local/Community-based activities would incorporate collaboration with Washington, Clackamas, and Clark County, Washington. Grant funded activities include: Planning and conducting workshops,; outreach to special populations regarding housing rights; and production of information brochures and pamphlets.

ESTIMATED BUDGET:	Direct/Indirect	
Federal Share:	\$93,800/\$8,200	8.2%
State Share:		%
Local Share:	\$15,000/00	%
TOTAL:	\$108,800/\$8,200	7.5%

EXPLANATION OF LOCAL SHARE: (Explain indirect costs, hard match, in-kind, etc.) Local share is comprised of in-kind and donated support for the 1996 annual Fair Housing Conference.

SPECIFY REPORTING AND/OR BILLING REQUIREMENTS OF GRANTOR AND WHO REPORTS: FINANCE: XX DEPARTMENT: XX. IF DEPT REPORTS, INDICATE REASONS.

Reports include financial and performance information.

GRANT DURATION AND FUTURE RATIO (INDICATE AMOUNT OF COUNTY MATCH PER YEAR): 12 Month duration, \$15,000 local match per year.

ADVANCE REQUESTED: ___ YES, ___XX___ NO. IF NOT, INDICATE REASONS.

Federal grantor functions in a reimbursement policy.

PERSONNEL DETAIL (Use appropriate County classification with yearly costs)

	FULL TIME	FRINGE/INSURANCE	TOTAL
.5 FTE CD SPEC	\$36,018	\$16,427	\$52,445

(.4 FTE costs of this classification are \$20,978.00)

EXPLAIN MATERIALS AND CAPITAL EXPENDITURES WITH TOTAL DOLLAR AMOUNTS.

M&S	\$87,822.00
CAPITAL	0.00

COMMENTS:

GRANT MANAGER

 2/4/94
Signature date

BUDGET DIVISION

 2-8-94
Signature date

FINANCE DIVISION

 2/7/94
Signature date

PERSONNEL DIVISION

 2/7/94
Signature date

DEPARTMENT DIRECTOR

 2/7
Signature date

BUDGET MODIFICATION NO. DLS # 3

(For Clerk's Use) Meeting Date FEB 17 1994
Agenda No. R-8

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date) _____

DEPARTMENT Library DIVISION Central Library
 CONTACT Margaret Epting TELEPHONE 248-5499
 *NAME(S) OF PERSON MAKING PRESENTATION TO BOARD June Mikkelsen

SUGGESTED AGENDA TITLE (to assist in preparing a description for the printed agenda)

Reclassification of Librarian 2 to Central Library Coordinator

(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

[X] PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET

Reclassification of Librarian 2 (nonexempt) in the Central Director's Office to Central Library Coordinator (exempt). This is a new classification, created to assist the Central Library Director with daily operations and staff supervision for the Central Library construction project.

The Library will cover the additional \$2,402 costs within existing library resources in the Library Fund. There will be no impact on the General Fund.

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1994 FEB - 8 AM 10 38

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)
None

4. CONTINGENCY STATUS (to be completed by Finance/Budget)
Contingency before this modification (as of _____) \$ _____
(Specify Fund) (Date)
After this modification \$ _____

Originated By	Date	Department Manager	Date
Budget Analyst	Date	Personnel Analyst	Date
Board Approval			Date

Ching Hai 2/1/94
Shirlee Robertson 2/1/94
Cris A. Peterson 2-17-94

2999E/11 Sent Original to Ching Hai on 2-18-94.

PERSONNEL DETAIL FOR BUDGET MODIFICATION NO.

DLS #3

5. ANNUALIZED PERSONNEL CHANGES (Compute on a full-year basis even though this action affects only a part of the fiscal year (FY).)

FTE Increase (Decrease)	POSITION TITLE	BASE PAY Increase (Decrease)	ANNUALIZED Increase/(Decrease)		TOTAL Increase (Decrease)
			Fringe	Ins.	
			(1.00)	Librarian 2	
1.00	Central Library Coordinator	40,729	10,972	5,309	57,010
TOTAL CHANGE (ANNUALIZED)		1,921	517	(36)	2,402

6. CURRENT YEAR PERSONNEL DOLLAR CHANGES (Calculate costs/savings that will take place in this FY; these should explain the actual dollar amounts being changed by this BudMod.)

Permanent Positions, Temporary, Overtime, or Premium	Explanation of Change	BASE PAY Increase (Decrease)	CURRENT FY Increase/(Decrease)		TOTAL Increase (Decrease)
			Fringe	Ins.	
			Changes effective February 16, 1994		
(0.38)	Librarian 2 (Cut)	(14,747)	(3,973)	(2,031)	(20,751)
0.38	Central Library Coordinator	14,747	3,973	2,031	20,751
Cost Changes this fiscal year will be absorbed within current appropriations.					
TOTAL CURRENT FISCAL YEAR CHANGES					

BOARD OF COUNTY COMMISSIONERS
AGENDA ITEM BRIEFING
STAFF REPORT SUPPLEMENT

TO: BOARD OF COUNTY COMMISSIONERS

FROM: JUNE MIKKELSEN, CENTRAL LIBRARY DIRECTOR

TODAY'S DATE: 1/31/94

REQUESTED PLACEMENT DATE: 2/17/94

RE: BUDGET MODIFICATION

I. Recommendation/Action Requested:

Approval of budget modification reclassifying one nonexempt Librarian 2 to the newly created exempt classification of Central Library Coordinator.

II. Background/Analysis:

The reclassification request for this position was approved by the library's Employee Services Personnel Analyst. The Central Library Coordinator will assist the Central Library Director with staff supervision and daily operations for the Central Library construction project. Since it is a new classification, Board approval is required.

III. Financial Impact

None. The additional cost of \$2,402 will be covered with existing resources within the Library fund.

IV. Legal Issues

None

V. Controversial Issues:

None

VI. Link to Current County Policies:

None

VII. Citizen Participation:

None

VIII. Other Government Participation:

None

PLEASE PRINT LEGIBLY!

MEETING DATE

2/17/04

NAME

C. H. SANDMAN

ADDRESS

218 SE 24TH

STREET

HILLSBORO

97123

CITY

ZIP CODE

PHONE 640 4034

I WISH TO SPEAK ON AGENDA ITEM #

A-9

SUPPORT

OPPOSE

SUBMIT TO BOARD CLERK