



MULTNOMAH COUNTY OREGON

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

GLADYS McCOY • Chair • 248-3308
PAULINE ANDERSON • District 1 • 248-5220
GRETCHEN KAFOURY • District 2 • 248-5219
CAROLINE MILLER • District 3 • 248-5217
POLLY CASTERLINE • District 4 • 248-5213
JANE McGARVIN • Clerk • 248-3277

AGENDA OF
MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS
FOR THE WEEK OF
April 4 - 8, 1988

Monday, April 4, 1988 - 10:30 AM - Briefing on Executive Budget -
Portland Building, Conference Room F - 14th Floor

Tuesday, April 5, 1988 - 9:30 AM - Planning Items and other formal
matters Page 2

Tuesday, April 5, 1988 - 1:30 PM - Informal Meeting Page 4

Wednesday, April 6, 1988 - 1:30 PM - Intergovernmental Relations
Meeting Page 5

Thursday, April 7, 1988 - 9:30 AM - Executive Budget Message Page 6
10:00 AM - Remarks by Citizen Involvement
Committee and Central CBAC
members
10:15 AM - Opening Organizational Budget
Meeting & Revenue Overview
11:00 AM - Formal Meeting

Tuesday, April 5, 1988 - 9:30 AM

Multnomah County Courthouse, Room 602

Decisions of the Planning Commission of March 14, 1988:

The following Decisions are reported to the Board for acceptance and implementation by Board Order:

- PR 1-88 Approve requested amendment of the Centennial Plan Map, changing the designation of the subject property from "medium density residential" to "high density residential";
- ZC 3-88 Approve amendment of Sectional Zoning Map #400, changing the described property from MR-3, medium density residential district to HR-1, high density residential district, all for property at 14849 SE Division Street

The following Decisions are reported to the Board for acknowledgement by the Chair:

- CU 4-88 Approve creation of a six-acre Mortgage Lot in the EFU-38 zoning district, subject to a condition, for property located at 23818 NW Oak Island Road
- CU 5-88 Denied applicant's request to increase the number of truck trip ends to 20 per hour, to increase the allowable annual tonnage to 200,000T, and for expansion of the clay mining operation to include Lots 18 and 24, Bayne Suburban Farms; Approve, subject to conditions, a three-year renewal of the clay mining operation on Lots 21-24, Bayne Suburban Farms, all for property located at 14042 NW Cornelius Pass Road

INFORMAL BRIEFING: (following Planning Items)

Joint meeting of Board of County Commissioners with Portland Public School Board of Education

AGENDA

- 1) Youth Planning Network report on programs for 0-7 year olds
- 2) Teen Pregnancy Prevention, including school-based Teen Health Centers
- 3) School Mental Health Program
- 4) Youth Alcohol and Drug Programs
- 5) Programs for the Developmentally Disabled, including early intervention services
- 6) Youth Service Centers

11:00 AM - TIME CERTAIN

Public Hearing - In the matter of reviewing the regional tourism strategy recommendations to the Oregon Tourism Alliance including preliminary response from the Economic Development Department

Tuesday, April 5, 1988 - 1:30 PM

Multnomah County Courthouse, Room 602

INFORMAL

1. Informal Review of Bids and Requests for Proposals:
a) Sheriff's Office time keeping and reporting system
2. Presentation of pins to Commissioners by the Rose Festival Association - Rick Steinfeld, president; and Gene Leo, Executive Director (1:30 pm)
3. Presentation of City of Portland Urban Services Plan - (1:35 pm)
4. Informal Review of Formal Agenda of April 7

-5-

Wednesday, April 6, 1988 - 1:30 PM

Room 602-County Courthouse

INTERGOVERNMENTAL RELATIONS COMMITTEE MEETING

AGENDA

1. Work Session on Committee's short list of Portland and Gresham issues with discussion of committee role

Thursday, April 7, 1988, 9:30 AM

Multnomah County Courthouse, Room 602

Formal Agenda

NOTE: Executive Budget Message scheduled for TIME CERTAIN at 9:30 AM

9:30 AM

Executive Budget Message by County Chair, Gladys McCoy

10:00 AM

Remarks by Citizen Involvement Committee and Central CBAC members

10:15 AM

Opening Organizational Budget Meeting & Revenue Overview

11:00 AM

FORMAL MEETING

REGULAR AGENDA

- R-1 In the matter of presentation of Certificates of Appreciation to the following:
a) Ralph Griffin
b) Burt Nelson
c) Roy Bennett

DEPARTMENT OF ENVIRONMENTAL SERVICES

- R-2 Orders in the Matter of Establishing Roads:
a) SE Hawthorne Blvd. . Road No. 4960
b) NE 195th Avenue . . Road No. 4961
- R-3 Order in the Matter of Authorizing Execution and Acceptance of a Deed for Various Streets from Multnomah County for Dedicated Street Purposes
- R-4 Order in the Matter of the Conveyance to the City of Gresham various one (1) foot strips (street plugs) owned by the County

DEPARTMENT OF GENERAL SERVICES

- R-5 Resolution renewing application of eligibility to participate in the Federal Property Utilization Program

DEPARTMENT OF HUMAN SERVICES

- R-6 In the matter of ratification of a revenue contract modification with State Senior Services Division, adding \$110,795 of federal Older American Act and State Oregon Project Independence funds to Aging Services Division, to increase Day Care, Respite, In-Home and Case Management services
- R-7 Budget Modification DHS #40 reflecting revenue increases to Aging Services (\$70,667) (Federal Older American Act - Title III); and MCCA (Title III & Oregon Project Independence (OPI) funds (\$11,628) in various line items adding one Protective Services staff position for remainder of FY 87/88, making service reimbursements to Telephone Fund (\$2000), Insurance Fund (\$1,630), and Fleet Fund (\$1,500)
- R-8 Notice of Intent to apply for Technical Assistance Grant to develop Street Law Program at Donald E. Long Home (\$2500) from the National Street Law Program
- R-9 In the matter of ratification of an intergovernmental revenue agreement between the Oregon Dept. of Education and the Social Services Division, DD Program Office, whereby County will receive \$69,074 over a 15 month period (April 1, 1988 to June 30, 1989) to provide classroom and home based early intervention services to 24 developmental disabled children and their families
- R-10 Budget Modification DHS #41 reflecting additional revenues in the amount of \$14,665 for FY 87-88 from the Oregon State Department of Education to Social Services Division, DD Program Office, various line items, for the Early Intervention Grant award
- R-11 Request for ratification of Amendment (#11) to State Mental Health Grant whereby County will receive \$49,196 to implement new Diversion Services for Developmentally Disabled Clients in jeopardy of being placed in State Training Facility FY 87/88

- R-12 Budget Modification DHS #42 reflecting a revenue increase to Social Services in the amount of \$49,196 to implement new Diversion Service for DD clients in jeopardy of being placed in State Training Facility (Amendment #11 to State Mental Health Grant)

ORDINANCES - DEPARTMENT OF JUSTICE SERVICES

- R-13 First Reading - An Ordinance amending MCC 5.10.435 raising fees for conciliation services and mediation services provided by the Family Services Division for the Multnomah County Circuit Court (NOTE: Ordinance contains emergency clause)

SHERIFF'S OFFICE

- R-14 Order in the matter of accepting deed for Inverness Property from the City of Portland for jail purposes - public testimony invited - (Continued from March 31)
TIME CERTAIN - 11:00 AM
- R-15 In the matter of accepting bids for Inverness Corrections Facility

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

Thursday, 10:00 PM, Channel 11 for East and West side subscribers
Friday, 6:00 P.M., Channel 27 for Rogers Multnomah East subscribers
Saturday 12:00 PM, Channel 21 for East Portland and East County subscribers

BIDS

1 4/5/88 pm

TO: DAILY JOURNAL OF COMMERCE

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: April 26, 1988 at 2:00 P.M.

Proposal No. RFP# 800362

Sealed proposals will be received by the Director of Purchasing, 2505 S.E. 11th Ave., Portland, OR 97202 for:

The Sheriff's Office Timekeeping and Reporting System for
the design, programming and implementation of same.

**The MANDATORY Vendor's Conference will be held at 9:30 am to 11:30am,
Pacific Daylight Time, on April 18, 1988, in Conference Room 308,
of the 3rd floor of the Justice Center, 1111 S. W. 2nd/1120 S.W.
3rd St., Portland, OR. Only those vendors attending the Vendor's
Conference will be allowed to submit RFP documents.

Multnomah County reserves the right to reject any or all proposals.

Copies of the proposal may be obtained at: Multnomah County Purchasing Section
2505 S.E. 11th Avenue
Portland, OR 97202
(503) 248-5111

Lillie Walker, Director
Purchasing Section

PUBLISH: April 7, 8 & 11, 1988

Urban Services
Studies + Rpts
✓

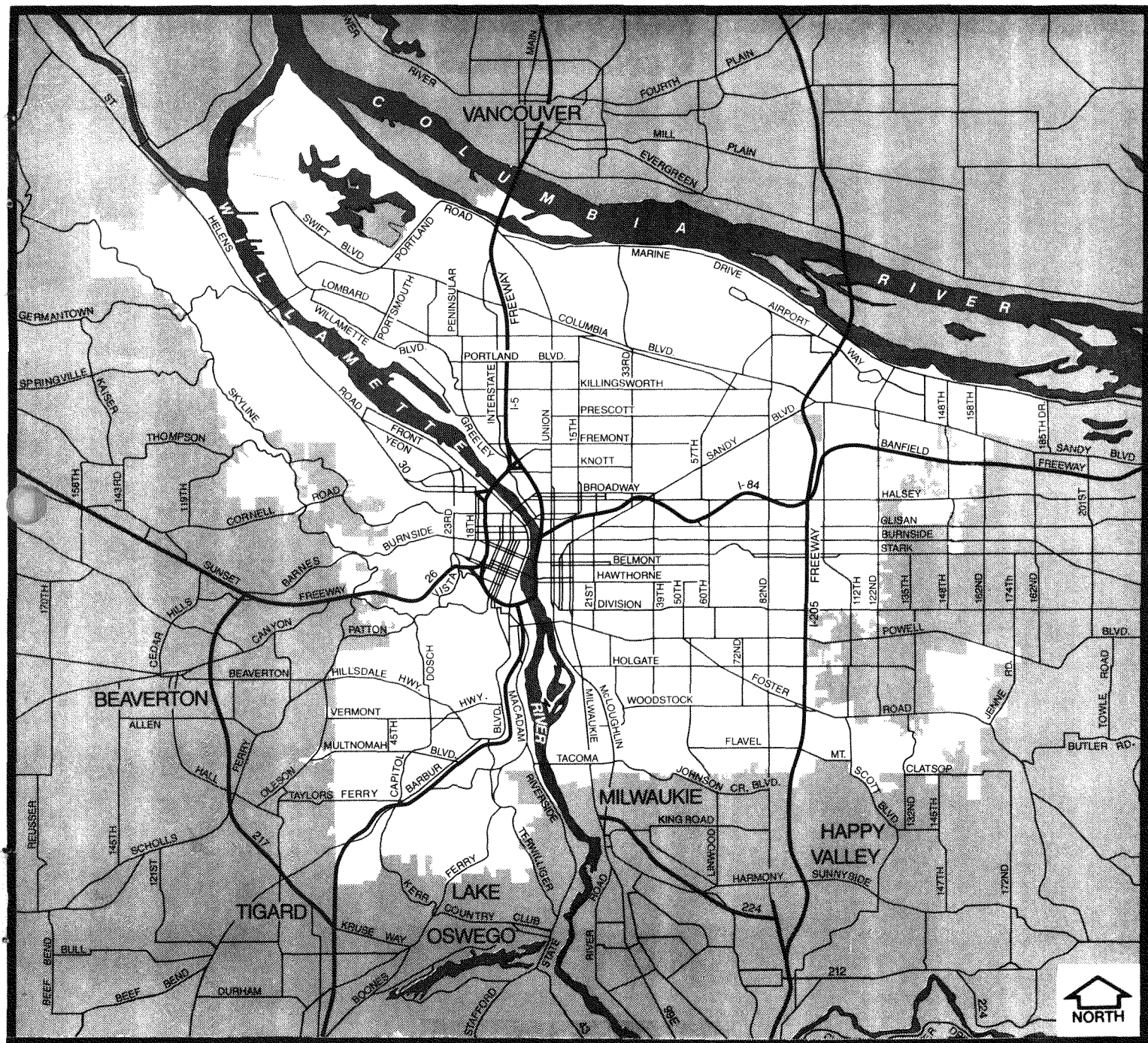
Inf #3
4/5/88

URBAN SERVICES INFORMAL AGENDA

- I. INTRODUCTION
- II. HISTORY OF PROGRAM
- III. ACCOMPLISHMENTS
- IV. FISCAL ANALYSIS
- V. RECOMMENDATIONS

DRAFT

CITY OF PORTLAND
URBAN SERVICES POLICY / ANNEXATION PROGRAM
FIVE YEAR REVIEW



OFFICE OF FISCAL ADMINISTRATION
MARCH 1988

**URBAN SERVICES POLICY AND ANNEXATION PROGRAM
FIVE YEAR REVIEW**

OFFICE OF FISCAL ADMINISTRATION

STEVE BAUER

Director of Fiscal Administration

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MARCH 1988

Summary

The City Council adopted the Urban Services Policy (USP), Resolution 33327 (Appendix 1), on February 23, 1983. This action was preceded by a decade of growth regionwide and a realization on Portland's part that the City needed to coherently address a broad range of issues in a singular fashion. Portland was addressing several disparate elements in its USP.

- <> An *Urban Subsidy* estimated at between \$11 million and \$13 million in FY'82-83
- <> A limited base of developable industrial land within the City proper
- <> A declining population in the City proper
- <> A decreasing proportion of the total regional population
- <> The need to strengthen Portland's visible role as the region's leader, both in Oregon and nationally
- <> The fate of some 130,000 residents living in the urban unincorporated territory of Multnomah County created real uncertainties for the region
- <> A repetitive pattern of budget shortfalls for Multnomah County
- <> Service capabilities of the City adequate to serve a larger area

Multnomah County adopted Resolution "A" (Appendix 2) in March, 1983. The County recognized its responsibility to focus on services in demand countywide. Portland agreed to offer municipal services, through annexation, to developed, unincorporated areas within an Urban Service Boundary (USB) adopted as part of the City's Comprehensive Plan. The policy is being applied within specific geographic areas defined by the boundary. Now, five years after adoption of the two policies, this report is provided as a review of accomplishments to date and to consider the program's future direction.

Since Portland's vigorous annexation program started in 1983, the City has annexed 57,470 people living in a 15.3 square mile area assessed at \$1,861,425,860.00. The program accentuates citizen participation and information, in order to explain the rationale for the changes in services delivered by the two jurisdictions. Public involvement is a key element of the USP and is integral to the program's objective, which is annexation of the area within the USB.

The population of Multnomah County was 557,500 in 1983, of which 66% (365,000) were Portland residents. By the end of 1987, the County population had gone up by about 5,000, while the enumerated City population had grown by 55,144, to 75% (420,000) of the total county population. An estimated population of 47,000 residing in 8.25 square miles of unincorporated territory valued at \$1.28 billion remain to be annexed within Portland's Multnomah County segment of the USB. Approximately 82% (467,000) of Multnomah County's population will reside in Portland when annexations are completed.

Subsequent to annexation, new citizens are intermixed into the City through a variety of programs. These include the neighborhood needs analysis/budget process, neighborhood association organization, and participation in City committees and commissions. Major rearrangement of local government resources has taken place due to the sizeable population, area, and taxable value of real estate coming into Portland during the past five years.

Fiscal analysis of the annexation program shows a slight negative overall impact on revenues and the City's service levels during the past five years. That trend has slowed down due to decreased annexation activity in 1987. A similar pattern is expected as the

program progresses, but the problem will be somewhat lessened by timing the effective date of annexation to correspond to the fiscal calendar. This practice was adopted by Council in 1987, and eliminates the costly extension of services to annexed areas before being assessed a city tax.

Five years into the program's implementation, several results are notable:

- <> Progress in dealing with the urban subsidy
- <> County General Fund now healthy and focused on countywide services
- <> Annexation of substantial tracts of developable industrial land
- <> City population is rising and ratio of regional population is increasing
- <> Portland's role as the regional leader has been strengthened in Oregon and nationally, and its Aaa bond rating has been maintained
- <> Service delivery problems in the urban unincorporated area are being solved

Growth through annexation has led Portland to invest in major capital improvements for newly annexed areas, as well as delivering the basic municipal services. Annexation of the Columbia South Shore area, believed to be the largest vacant industrial tract remaining on the West Coast, has finally opened the door for development of over 1,400 acres of general employment and industrial land. Levels of police protection in newly annexed areas are more than double what the County provides. The Police Bureau has responded to approximately 100,000 calls for service in these areas. Portland has taken title to fifteen annexed County parks. Over \$2.5 million has been spent to restore, maintain and improve these annexed parks since 1983. More than 359 miles of roads have come under Portland's jurisdiction. The City has received \$19.6 million in County road revenues since fiscal year 1984-85, spent an estimated \$17.8 million in transportation services and incurred \$14.5 million in capital for the same period. The Bureau of Planning has completed Community Plan reformatting in three areas and zoning conversions in six areas. New neighborhood associations have formed in Woodland Park, Argay Terrace, Cully, Parkrose Neighborhood, Parkrose Heights, Parkrose Community, Hazelwood Community, Brentwood/Darlington, Gilbert-Powellhurst Community, and Mill Park. The Wilkes Community, Clifgate, and Leach Garden neighborhoods are forming now.

Multnomah County began this program, in part, due to an estimated \$14 million General Fund shortfall in FY '82-'83. Improvements in Multnomah County's budget situation are measurable, and due largely to the lowered demand for municipal services in unincorporated neighborhoods. It is estimated that Multnomah County is now reallocating a minimum of \$3.1 million annually from municipal services to at least 17 different countywide programs, including health and human services, the criminal justice/jail system, assessment and taxation, libraries, and regional park improvements. Annexations have triggered the transfer of sixty deputy sheriffs thus far. Portland and Multnomah County have cooperated in an exemplary manner; their cooperation has included both policy and financial support, as well as extensive participation by public officials.

Joint implementation of Portland and Multnomah County's urban service policies provided for public involvement, and a comprehensive information package in various communication milieus was developed to market the program. Components include a Portland Urban Services Directory, a County Services Directory, tax cost comparison worksheets, issue and service oriented brochures, a slide show narrated by the Mayor, cable television programs, and neighborhood-tailored newsletters.

Several other cities in the metropolitan area have or are in the process of developing their own urban service policies and boundaries. Gresham has had an agreement with Multnomah County and an active annexation program since 1984. In Washington County,

Portland, Beaverton, Tigard, and Hillsboro have or now are developing service boundaries and have done substantial annexations in recent years. Clackamas County and Portland agreed on a services boundary in 1985 and several Clackamas County cities are developing service policies and boundaries.

Oregon's annexation statutes are recognized to be among the most conservative in the United States. In addition, the state's annexation statutes are designed for piecemeal annexation. There simply is no statutory method of large scale annexation that is consistent with state-mandated land use plans and that rationalize government structure and services. This is borne out by the time it has taken to get to this far, the plethora of lawsuits dogging the program, and a finding by the State Appeals Court that the triple majority annexation method is unconstitutional.

The 1987 Legislature created a new double majority method of annexation meant to replace triple majority. The double majority method requires support both from owners of the majority of land area and a majority of the registered voters within designated *intent to annex* areas filed with the Boundary Commission. Double majority appears to satisfy the concern raised by the Court of Appeals regarding the right of voters to have a say in annexation, while maintaining the involvement of property owners and providing certainty to the City for approval once the standards are met.

Recommendations

This report recommends Council ratification of the Urban Services Policy, adopted by an earlier Council. The report also recommends continuation of the program at a measured pace and development of an Urban Services Boundary to the west. The new double majority method of annexation is recommended for use by the City. Island annexation of isolated parcels is also recommended.

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SECTION I: REVIEW OF THE URBAN SERVICES POLICY

Introduction

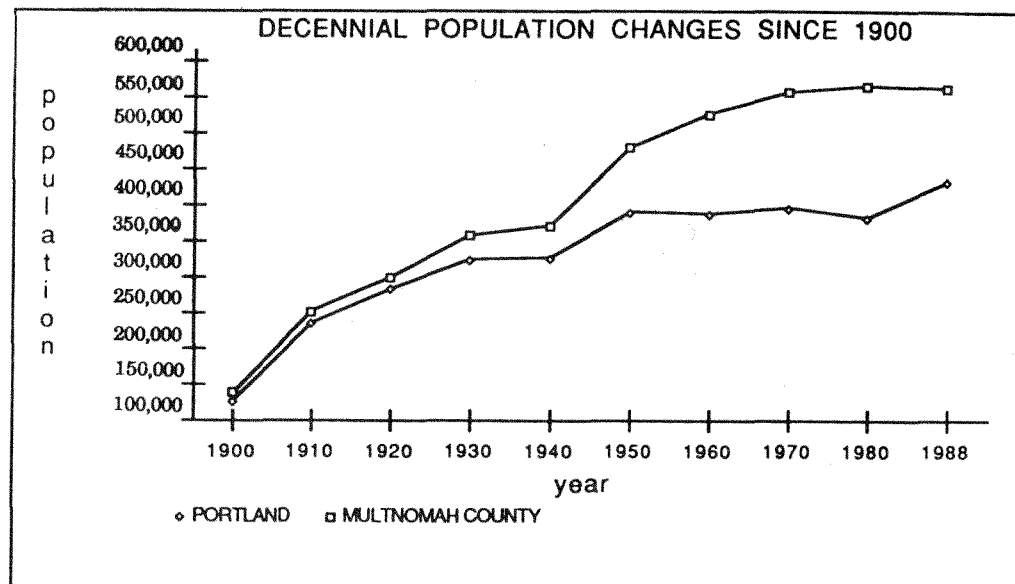
Portland embarked on an enterprising path of change and growth with the formal adoption of the Urban Services Policy by unanimous City Council action in February, 1983. The Policy was subsequently adopted by ordinance as a part of the City's Comprehensive Plan (1). The USP expresses Portland's intention to define its maximum municipal service area and cites annexation as the principal means to that end. This straightforward statement of City Policy is both visionary in its scope and practical in its application.

Urban Planning Area Agreements (2) are in place with Multnomah and Clackamas Counties establishing Urban Services Boundaries (USB) through amendments to the respective Comprehensive Plans. A similar process is underway to establish a Washington County segment of the boundary. According to the Comprehensive Plan, the USB **"defines the City's maximum geographic service area and incorporated limits."** In other words, Portland is now establishing what likely will become the outermost limits of the corporate city, although the Policy anticipates that the Boundary will undergo review and revision from time to time.

Rapid growth in unincorporated areas during the postwar era contributed to many of the services needs and problems that are being addressed by the Urban Services Policy. These include a lack of adequate service in parks, policing and environmental services; fragmented and overlapping service delivery systems; and the subsidization of unincorporated areas by the incorporated cities in the County.

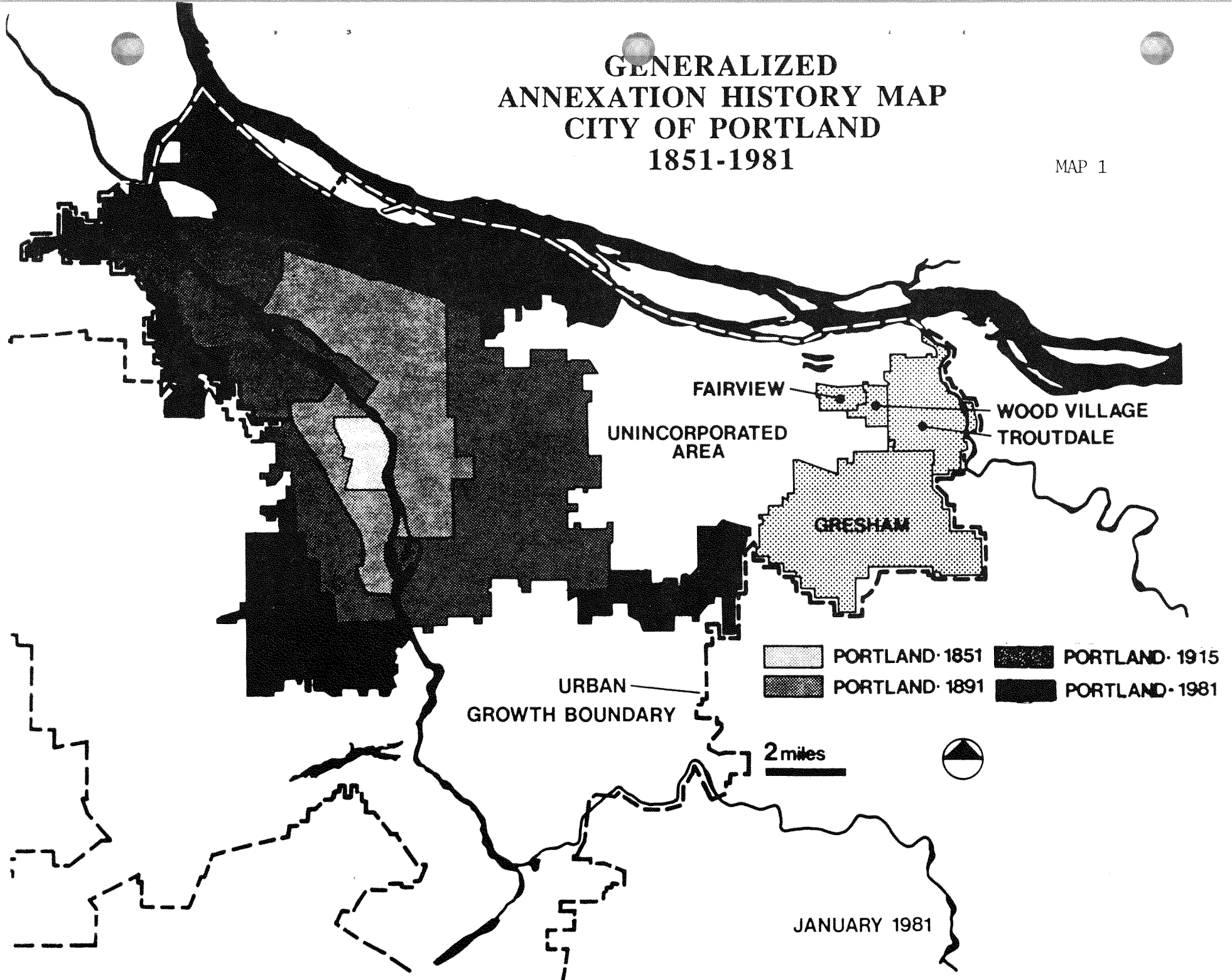
It is a pattern seen in Portland before, when growth outpaced movement of the City boundary, first in Albina, East Portland and Sellwood in the 1880's, later in Linnton, St. Johns, and eastside neighborhoods generally from 42nd Avenue to 82nd Avenue between 1900 and 1915. Significant growth began even more recently and is most dynamic now in suburban Clackamas and Washington Counties, where incorporation and annexation to existing cities are currently being considered. Maps 1 and 2 on the following pages generally represent Portland's and Multnomah County's annexation history through 1987.

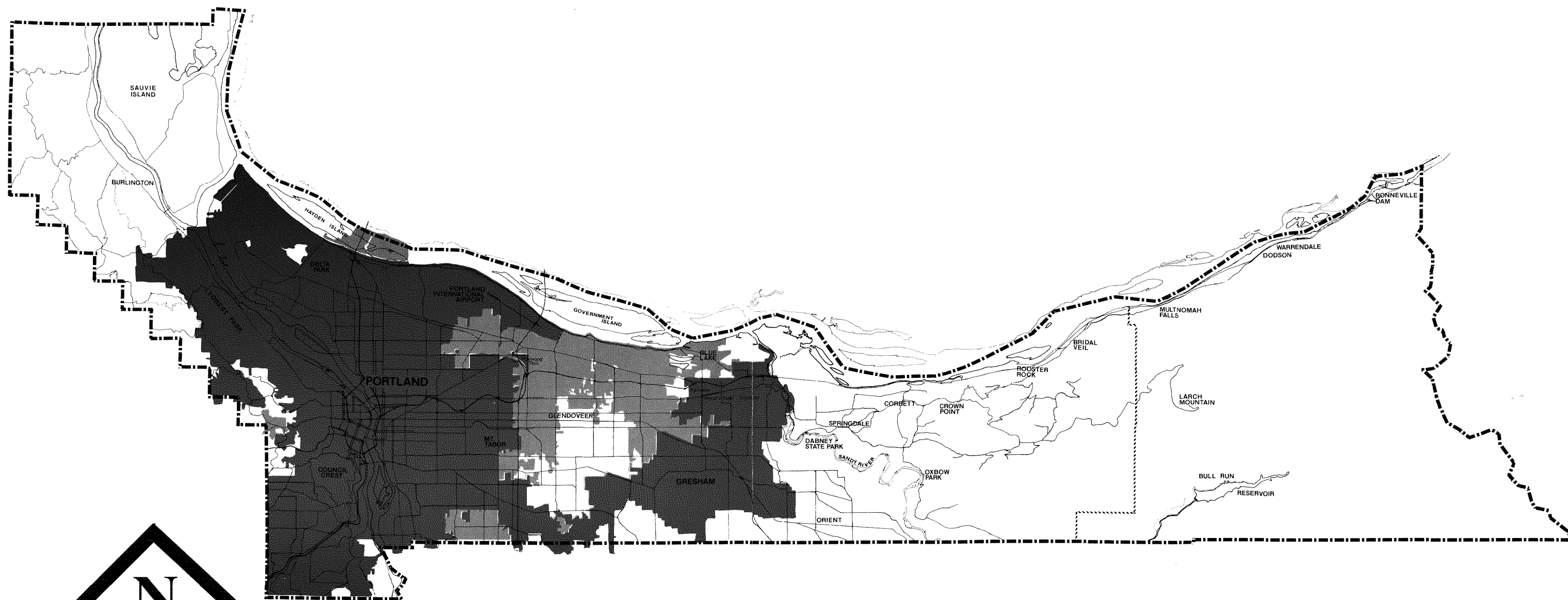
Graph A :



GENERALIZED ANNEXATION HISTORY MAP CITY OF PORTLAND 1851-1981

MAP 1





MULTNOMAH COUNTY

Showing the relationship between the County and incorporated areas within it



AREA IN CITIES BEFORE 1983



AREA ADDED TO CITIES SINCE 1983

0 1 2 4 MILES



CITY OF
PORTLAND, OREGON
OFFICE OF FISCAL ADMINISTRATION

Accomplishments

Already more than 57,000 people have joined Portland through annexation of lands valued at \$1.86 billion. For the first time in our history the City population has crossed the 400,000 mark, now at 420,000. Another 47,000 Multnomah County residents within the USB await annexation, promising to push the City population above 465,000. Future annexations within the USB in Clackamas and Washington Counties will likely take the City's population to the one-half million mark, an important achievement which will set the tone for Portland's sphere of influence in the next century.

The additional population affects the City positively in that a trend toward a declining central city population is being dramatically reversed. After several years of modest growth, the City's population began to drop, and bottomed out at 365,000 in 1983. Revenues apportioned on a per capita basis increase based on the population annexed, and Portland's political representation increases with annexation. The Columbia South Shore area is one of the single largest general employment/industrial tracts remaining for development on the West Coast, with the potential for supporting more than 20,000 new jobs because of the services that the City has extended to the area.

In the last five years, annexations to Portland in the east and south County areas have increased the number of state legislative districts which include City territory from 22 in 1983, to 27 in 1988. In 1983, all or portions of 13 state representative districts and nine state senate districts were within City boundaries. In 1988, four additional state representative districts (two each in the east and south County areas) and one state senate district include areas within the City limits of Portland. In pure quantitative terms, this means that 30% of the members of the Oregon Legislative Assembly represent at least a segment of the City of Portland and its residents.

Two major new transportation corridors, the entire Multnomah County segment of I-205 and much of the MAX light rail line, are now within the City.

Although implementation of the USP may take Portland's population to a half million, we will remain one of the smaller major cities on the West Coast. Table A compares Portland and its metropolitan area with selected cities. It is clear that Portland will continue to be a major Pacific Coast port, and one of the most solid. Much of the territory being annexed to Portland is developed, improved housing and businesses, or significant tracts planned for general employment opportunities. Only one other major West Coast city, Los Angeles, can boast a AAA bond rating. Portland's shipping port ranks high among West Coast cities, first in some categories.

The USP and Annexation Program are doing more than just making the city bigger. An expanded service area reinforces the vitality of Portland and enhances economic development opportunities for decades to come. Costly duplication of services is being reduced to the benefit of both City and County governments.

Table A:

POPULATION & DENSITY CHARACTERISTICS OF SELECTED CITIES*

CITY	CITY/SMSA POP	% POP CITY PROPER	CITY AREA(sq. miles)
ANCHORAGE	250,000 / 250,000	100%	1,732
DENVER	504,588 / 1,827,100	27%	111
INDIANAPOLIS	710,280 / 1,203,100	59%	352
LONG BEACH, CA	378,752 / 8,108,700	5%	50
LOS ANGELES	3,096,721 / 8,108,700	38%	467
NEW ORLEANS	559,101 / 1,324,400	42%	199
OAKLAND, CA	352,000 / 4,882,300	7%	54
PORTLAND, OR	420,000 / 1,341,000 **	31%	132**
SACRAMENTO, CA	304,000 / 1,258,200	24%	--
SAN FRANCISCO	713,000 / 3,483,800	20%	46
SAN JOSE, CA	686,000 / 1,398,500	49%	171
SEATTLE, WA	491,300 / 2,208,000 **	22%	145**
VANCOUVER/BC	414,000 / 1,331,000	31%	--
GUADALAJARA	1,540,000 / 2,800,000	55%	78

*Information compiled from The 1988 Information Please Almanac

**Denotes use of 1988 figures compiled by Urban Services Division

Tax Equity and Urban Subsidy

The matter of tax equity, which came to the forefront in the 1970's, concerns the tax revenues spent on the provision of municipal services by Multnomah County to residents in unincorporated, urban neighborhoods. City residents pay a City tax rate for their municipal services in addition to the rate paid to Multnomah County for county services. While City residents pay the same County tax rate as unincorporated residents for the County's services, they have not always received a proportionate share of county services. This disparity has come to be called the urban subsidy.

One provision of the Oregon Constitution is that local governments levy uniform tax rates within their jurisdictions. All property owners in a county pay the same tax rate for county services. An owner of property lying within a city or other taxing district pays a separate tax rate for the services of that city or special district, on top of the county tax. In the situation of a county which includes urban, unincorporated areas, the county is precluded from imposing an additional tax to provide municipal services to urbanized areas outside of cities unless a special service district is created. Where a county chooses to provide municipal services to unincorporated areas with General Fund revenues, the result is that a disproportionate part of the tax revenues collected countywide are dedicated to delivering services to a fraction of the county taxpayers.

Earlier attempts to solve the urban subsidy problem and eliminate duplicative services focused on City-County consolidation, which had been proposed as early as 1919 and again in 1927. The most recent proposal was presented in 1974, failing at the polls just as the earlier proposals.

Beginning in 1977, several studies were conducted by various agencies in order to quantify the urban subsidy. The following chronology summarizes those studies and the findings of each:

1977: The first analysis, Financial Planning Report #8 (3) of the Multnomah County Management Office, found that Portland contributed \$153.00 per capita in county taxes in fiscal year 1976-77, while it received \$121.00 in county services, a net loss of \$32.00 per person. This figure amounted to approximately \$11.8 million annually;

The Metropolitan Area Boundary Commission issued a paper in 1977(4) which concluded, in part, that :

"...In virtually all cases, the unincorporated areas examined pay a fractional share of the services provided to them by the County. Portland, on the other hand, generally pays far in excess of what it (the County) contributes."

1979: Multnomah County contracted with the Center for Urban Studies at Portland State University to review its 1977 study. Multnomah County Services Reexamined: Final Report, (5) was published in March, 1979. The findings were that Portland, with just over 69% of the County's population, received about 51% of county services while contributing 63.5% of the County's revenues.

1983: A subsequent study of the County budget done by the Center for Urban Studies(6) found County revenue from Portland exceeded County expenditures in Portland by \$13.8 million. At the same time, in unincorporated areas County expenditures for services exceeded revenues from those areas by \$11.2 million.

Policy Adoption by Portland and Multnomah County

Multnomah County's financial picture was further complicated in 1982 and 1983, when budget shortfalls approached \$14 million. Some of the shortfall was attributable to cuts in Federal Revenue Sharing Programs. Other factors included the effects of economic recession on revenues coupled with continued provision of municipal services and increased operating costs and human service demands. The combined impact of decreased revenues and increased service demands caused Multnomah County to seek a solution.

City and County leadership joined in discussions regarding the fiscal inequities associated with services. The City Council adopted Resolution 33210 (Appendix 3) on July 14, 1982, directing the Offices of Fiscal Administration and Intergovernmental Affairs, and the Bureau of Planning to jointly develop and propose an Urban Services Policy. The City Council adopted its USP on February 23, 1983.

The Board of Multnomah County Commissioners adopted its complementary policy as Resolution "A" on March 15, 1983. It stated, in part:

"...The first priority for the available resources of Multnomah County shall be for those services available to all residents of the County, such as Assessment and Taxation, Elections, Corrections, Libraries and Health Services....County services generally described as 'municipal services' at a level considered 'urban' rather than 'rural' shall be proportionately reduced starting FY 1983-84 through FY 1986-87 to establish a minimal and essentially rural level of municipal services throughout Multnomah County."

Related State Law and Policy

The policies of Portland and Multnomah County regarding urban services were consistent with policies at the state level. The Portland Metropolitan Area Local Government Boundary Commission (PMALGBC or Boundary Commission) was established in 1969 in order to influence and improve the structure of local governments by providing an impartial review of boundary changes and proposals to create new governmental units. Likewise, the Land Conservation and Development Commission (LCDC), created during the 1973 session of the Legislature, made a basic distinction between *urban* and *rural* early on in the process of developing its Goals and Guidelines document.

Boundary Commission:

When the Portland Metropolitan Area Boundary Commission was created by the 1969 Legislature, its assigned purpose was to address annexation issues and the proliferation of special districts in this region. At that time there were approximately 300 Special Service Districts and 10 cities in the metropolitan area. Today, the number of special districts has been reduced to about 90, and there are 13 incorporated cities.

State law empowers the Boundary Commission to review and approve, deny, or modify the creation of annexations by cities and special districts (excluding educational districts) in Multnomah, Clackamas, and Washington Counties.

The Boundary Commission has an adopted policy (7), that generally recognizes cities as the primary providers of urban services. The policy reasons that:

- 1. The existence of many different governmental units makes the delivery of urban services unnecessarily complex. The visibility and political accountability of special districts are relatively low. Cities have the ability to balance service needs and allocate scarce resources after comparing the relative merits of each service.*
- 2. Cities generally offer a wide range of necessary services and generally do a better job of long range planning for service delivery, particularly in regard to less popular and visible services.*

3. *Cities offer greater opportunity for economies of scale and operational coordination.*

4. *Cities have greater fiscal resources available to them than many single purpose governments and are better able to balance the burden of paying for services.*

A second policy states that the Commission can favor illogical boundaries in the short term when the longer term governmental structure indicates eventual logic, economy, efficiency, structural simplification, greater community identity, and equity. In practice, the Boundary Commission has therefore approved irregular boundaries in Portland annexations when long term benefits and the City's Urban Services Policy favor them as a interim solution.

Land Conservation and Development Commission:

LCDC established the concept of an Urban Growth Boundary in 1976 in order to reduce urban sprawl, provide for choices in the land market, efficiently provide public facilities and services, and preserve lands for future urban development.

The Commission adopted a Goals and Guidelines document and Administrative Rules to guide local jurisdictions through the process of gaining Comprehensive Plan approval and acknowledgement. One point of particular interest required that jurisdictions requesting acknowledgement state in writing their plan :

"...setting forth the means by which a plan for management of the unincorporated area within the urban growth boundary will be implemented..."(8).

The UPAA's based on this rule and adopted by Multnomah County jurisdictions included a proviso to:

"Initiate a cooperative process to determine future service and annexation boundaries..."

Subsequent to the City's adoption of its Urban Services Policy, the Commission developed and adopted Administrative Rules calling for an inventory of public facility systems in metropolitan areas; identification of where they would be needed in the future; rough costs; description of the jurisdiction's service area; discussion of funding methods and policy statements or urban growth management agreements identifying the appropriate service provider.

Conclusion

General agreement among policymakers at the local and state levels, and changes in federal policy and revenue disbursement, paved the way for annexation programs in Multnomah County implementing Urban Service Policies. In just five years Multnomah County has reversed serious budget problems. Gresham's population has grown by more than 20,000 to 55,530, and Portland, at 420,000, has added a population equal to the whole City of Gresham.

Services of Multnomah County and Portland are being modernized, resulting in reduced duplication of service at the local level. In many ways a restructuring of local government is taking place as the USP is implemented through the Annexation Program. Municipal services once provided by the County have been or are now being reduced to a rural level, allowing County resources to be directed to countywide service demands. Portland is able to expand its service delivery area and redouble its efforts to deliver a full menu of municipal services.

The Urban Services Policy is as viable today as it was in 1983. Annexation is still the best means available to accomplish the goals of the Policy, even though more time is needed for implementation than originally thought. The scope of the program and timeline for completion are consistent with earlier periods of annexation growth in Portland's history

SECTION II: THE ANNEXATION/URBAN SERVICES PROGRAM

"The preferred method of serving people within the Urban Services Boundary is through annexation." (Resolution # 33327)

Overview

Although the USP was a newly articulated City Policy in 1983, it reflected a pattern integral to the growth of Portland. Subsequent to incorporation in 1851, major periods of growth through annexation occurred first in Albina, (inner) East Portland, and Sellwood, between 1882-1893; then in Rose City/Rocky Butte, St. Johns, Mt. Tabor, and Lents, between 1906-1915; and more recently the north- and Southwest Hills, Columbia Corridor from Kelly Point to the Airport, and the Southeast Hills and Powell Butte between 1958-1981.

The service areas Portland has agreed on with Multnomah and Clackamas Counties and the boundary options now being considered with Washington County will probably define the outer limits of geographic growth of the City for the foreseeable future. Since the USB either abuts the regional urban growth boundary or other jurisdictions are assuming service responsibility beyond the boundary, a greater consolidation of service is possible only by other means such as mergers and consolidations. Map 3 on the following page indicates Portland's adopted USB segments and shows metropolitan area city boundaries through 1987.

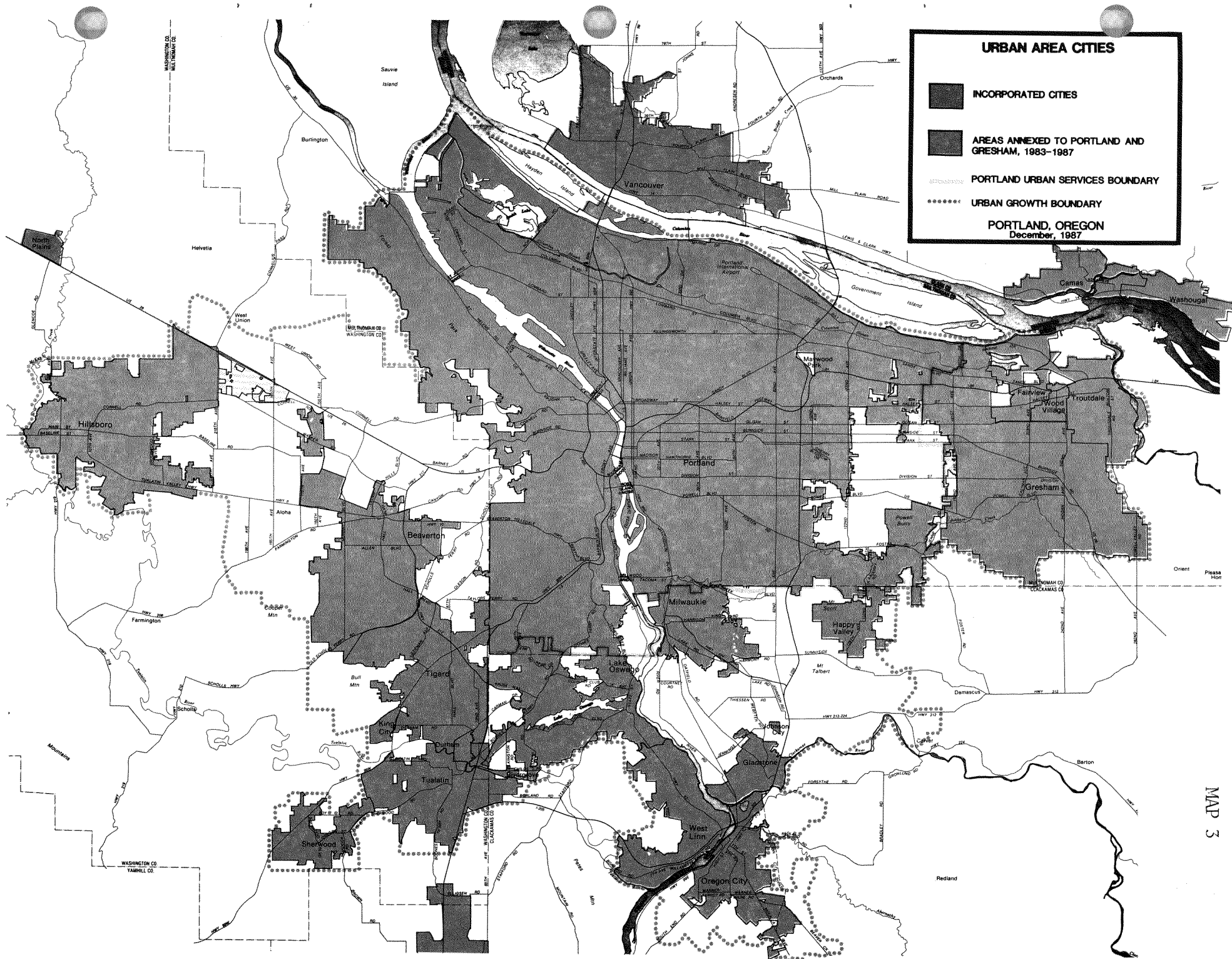
The Council established the boundary for the Clackamas County segment by amending the Comprehensive Plan and the City's Urban Planning Area Agreement with Clackamas County in April of 1985. A similar process led to adoption of the Multnomah County segment in December of 1986. The Urban Services Division of the Office of Fiscal Administration and the Bureau of Planning are examining the options for an appropriate boundary with Washington County. The boundaries are set after considering the provision of sewer, water, fire protection, streets and transportation, police protection, and parks and recreation.

Intergovernmental Agreements

The Portland Urban Services Policy and the County's Resolution "A" have resulted in several major intergovernmental agreements that facilitate urban service delivery within the areas of the City's potential responsibility. Major agreements involve fire, transportation, and water services. Appendix 4 lists the agreements reached between the City and other service purveyors during the past five years. The major agreements are discussed below:

Fire Protection

The City has signed five-year contracts with Multnomah Rural Fire Protection District No. 10 and Clackamas Fire Protection District No. 1 to assure continuity of service as major portions of each district are annexed and withdrawn. In each case the City provides fire and emergency medical services within the district, and district employees become City employees for the duration of the contract. The District Board continues as the governing and contracting body. The District No. 10 contract is renewable in June 1989; the District No. 1 contract is renewable in July 1991;



Road Agreement

The City/County Road Agreement rectifies the gas tax portion of the urban subsidy over time with a transfer of new revenues to the City. It also improves service efficiency by eliminating overlapping service delivery i.e., the City is responsible for all non-state roads within its limits and the County is responsible for all non-state unincorporated roads. The agreement stipulates that after FY 84-85 the City will receive a percentage of the County road funds based on the percentage of County roads annexed (after deducting funding for Willamette River bridges). Beginning in FY 85-86 the City has also received County road funding above the FY 83-84 resource level based on the City's share of the County's population. Other agreements provide for transfer of transportation personnel and equipment as annexations occur.

The Road Agreement dealing with transfer of County roads to the City and sharing of County road revenues with the City was a major element of the joint program to address the urban subsidy issue. The Annexation Program provides considerable financial benefits for the County since each parcel annexed continues to pay County taxes, but the County is relieved from the responsibility to provide municipal services. This "profit" has allowed the County to move from its \$14 million operating deficit in 1983 to a position of having a modest surplus and freeing up approximately \$3 million annually for countywide services;

Domestic Water

Portland has transitional agreements involving water services and personnel with Powell Valley Road Water District and Gilbert Water District. Each agreement provides that when the City has annexed 75% of the district, the District will initiate dissolution proceedings and the City will assume service to the remaining portion of the District. The Rose City Water District dissolved automatically once 100% of its territory was annexed, and Parkrose and Sylvan Water Districts dissolved subsequent to elections in those districts under similar transitional agreements;

Parks

The City and County have agreements relating to implementation of the Mid-County Parks Master Plan and transfer of County parks. The City has accepted title to fifteen newly annexed parks;

Sanitary Sewers

The City provides for operation and maintenance of sewer service to the remainder of the Central County Service District. The City provides permits and inspection service in the unincorporated area as part of the agreement to deliver sanitary sewers in accord with a State Environmental Quality Commission order. Portland is part of a consortium of local governments dealing with the sewer project in mid-County;

Police

No police agreements are currently in effect, although the City has provided contract protection in various unincorporated areas west of 122nd Avenue in the past. Mutual response occurs as a matter of course.

Citizen Participation

The City has entered into a comprehensive Public Information and Involvement Program to improve citizen awareness regarding the USP and Annexation Program.

Portland and Multnomah County officials and staff have participated in approximately four hundred public meetings since 1983. Meetings have been held inside the City and outside the City to explain the USP to existing residents, to unincorporated citizens, neighborhood gatherings, business and professional groups. Numerous small neighborhood coffees provided the forums.

An integrated intergovernmental information and marketing package has been developed to promote and facilitate completion of the program. Components of this marketing package include a City Urban Service Directory, a County Services Directory, tax cost comparison worksheets, informative brochures, an audio-visual program narrated by the Mayor, cable television programs, and neighborhood-tailored newsletters.

The focus of Portland's Annexation Program has been on grassroots organizing to develop a partnership with the City. The issue emphasized is municipal services. Keeping the discussion focused on services highlights what Portland does and what the unincorporated area needs. Bringing neighbors together to talk about services allows residents to identify their service needs and then recognize that Portland is the best option for delivery of those services.

The Office of Neighborhood Associations (ONA) sponsors a Neighborhood Needs Process (NNP), utilized by neighborhood associations, which serves neighborhoods and City bureaus alike. It is an institutionalized process, refined over the years, for bringing the technical expertise and financial resources of the City into action to satisfy the needs of the community. This process has been used as a focal point for teaching newly annexed areas about Portland's concept of neighborhood self-determination through neighborhood associations.

Since inception of the Annexation Program, Woodland Park, Argay Terrace, Parkrose Neighborhood, Parkrose Community Group, Parkrose Heights, Brentwood-Darlington, Cully, Gilbert Powellhurst, and Mill Park have all passed by-laws to be recognized as neighborhood associations by ONA. The Hazelwood Community Group passed their by-laws on February 18, 1988, and was formally recognized on March 17. Wilkes Community Group has adopted by-laws and should be recognized as Portland's 89th neighborhood association sometime in April or May. Leach Garden and Clifgate are neighborhoods in which organizing activities are occurring, but both are on a longer timeline than Wilkes.

Annexations 1983-1987

The first annexations following USP adoption were developed by citizens and property owners in the Columbia South Shore, Argay Terrace, and Summer Place areas, who moved quickly to develop the necessary consensus for annexation to Portland. As a result of their efforts, the 1,423 acres of Columbia South Shore (\$67 million in assessed value) and the 516 acres of Argay Terrace and Summer Place with a combined population of 5,200 (\$164.7 million in assessed value) came into Portland in November and December, 1983. Support for these key annexations to Portland was prompted partly by the possibility that a new city might be formed.

In 1983 the Mid-County Future Alternatives Committee (MCFAC), a citizen group opposed to annexation and sewers, filed an application with the Boundary Commission to form a new city called Columbia Ridge. Their solution to the urban services dilemma was to consolidate the City of Fairview with the unincorporated area between Portland and Gresham. The new city was to provide services through contracts with existing single-purpose special service districts, but would not provide sewer service. While litigation over the new city was in the courts, annexation activity was at a standstill.

Multnomah County began reducing its police, parks and planning services to a rural level and began transferring responsibility for annexed roads and for urban services in annexed areas to Portland in FY 1983-'84. Citizen-initiated annexations progressed in the Cully/Parkrose, Parkrose Heights, Wilkes, Leach Garden, Clifgate, Errol Heights and Hayden Island neighborhoods, spurred by imminent reduction of municipal services from Multnomah County.

It had been anticipated that Portland's corporate boundary would extend east to 122nd Avenue by 1986, thereby relieving the County of significant police costs. In order to reduce uncertainty, the County Sheriff and the Portland Police Bureau negotiated a contract that guaranteed urban police coverage to an area that was anticipated to be annexed soon. Beginning in January 1985, the Portland Police Bureau instituted police protection to areas in the unincorporated parts of the County west of 122nd Avenue. Activities concentrated on annexation of the contract areas before the contract ended on June 30, 1986. The contract was necessarily extended until November 1986. By that time islands created by triple majority annexations west of 122nd Avenue had been annexed.

The Oregon Court of Appeals ruled the triple-majority method of annexation unconstitutional in a landmark decision handed down in November of 1986. Seeking a way to keep the program moving, Council passed a resolution that called for annexation by the Council-initiated Resolution method. Under this method, Council initiates the annexation by adopting a resolution petitioning the Boundary Commission to approve the annexation proposal. The Commission holds a public hearing and then approves, disapproves or modifies the proposal. If 10% or 100 voters (whichever is less) in the affected area sign a remonstrance to the Boundary Commission's approval within 45 days of the final order, an election within the area on the issue must be held. The Council determined that it would initiate a resolution to annex an area once there was evidence of support for annexation from 55% of the voters in the proposal area.

The first proposal using the Council Resolution method was for east Hayden Island and included commercial, single-family and multi-family units. Many of the residential units

were part of homeowners' associations. Representatives of five of the six associations supported annexation and negotiated to obtain service agreements with the City. The residents wanted Bull Run water to replace their saline well water, better police service (they were served temporarily by the City under the police contract), and cheaper water and sewer rates than they had through the Hayden Corporation. They also obtained an agreement in which the City promised to maintain the street lights on a private road and maintain a two-man fire station on the island.

Property owner consent forms for this proposal had been collected under the triple majority statutes. But because the Appeals Court decision came down as the proposal was being prepared to go to a Council hearing, it was initiated using the Council Resolution method. About 64% of the property owners had signed consent forms. No remonstrance was filed on Hayden Island.

Due to the outcome on Hayden Island and to maintain momentum, several east Portland areas were selected for possible annexation using the Council-initiated Resolution method. Many of these neighborhoods had been close to satisfying triple majority standards before the City changed methods. In each neighborhood, canvassers recorded whether registered voters were in support or opposition to annexations. Seven annexations were initiated by the Council Resolution method, based on reported majority support amongst voters.

Subsequent to Boundary Commission approval, remonstrances were filed in each of the seven areas. Of the three annexation elections in September 1987, two failed, with the Glenfair annexation passing. In November, the next three annexation proposals failed. The last area approved by the Council Resolution method, Russell Street, was remonstrated and a majority of residents there voted for annexation on March 22, 1988. The effective date for that annexation is June 30.

A case by case accounting of annexations between 1983 and 1987 is attached as Appendix 5. The following table summarizes annual annexation activity for Fiscal Year 1983-84 through the second quarter of Fiscal Year 1987-88:

Table B:

ANNEXATION SUMMARY BY FISCAL YEAR					
YEAR ANNEXED	NUMBER OF CASES	POPULATION	HOUSING UNITS	ACRES	ASSESSED VALUE
FY 1983-1984	16	7,480	3,313	2,528.2	\$291,620,000
FY 1984-1985	18	7,247	3,105	1,610.1	\$238,867,000
FY 1985-1986	44	23,129	10,275	4,644.4	\$754,059,000
FY 1986-1987	32	19,245	8,417	3,179.2	\$565,373,000
FY 1987-1988	2	354	161	75.4	\$11,483,000
TOTALS	112	57,455	25,271	12,037	\$1,861,402,000

Source: City of Portland
Urban Services Division

Current City Boundary Analysis

One by-product of using the limited annexation techniques allowed by Oregon law is a very irregular corporate boundary in many areas. The boundary is satisfactory where it abuts the Regional Urban Growth and/or Service Boundary, and generally acceptable where it has remained static for some time. However, where activity has been most intense, islands and long stretches of crooked boundaries remain. The maps on the following two pages exemplify this situation (Map 4 and Map 5).

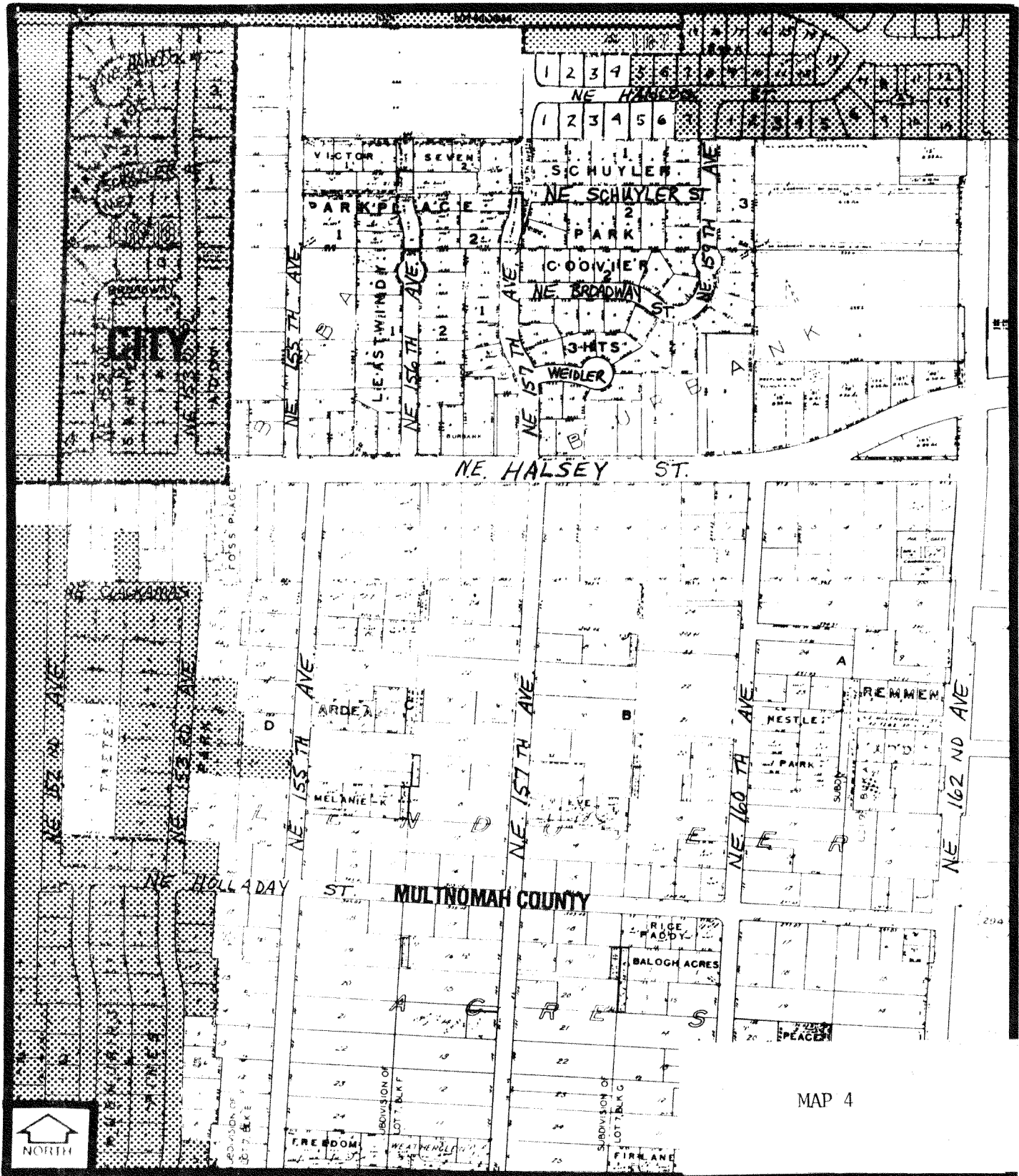
Islands remain in the recently annexed neighborhoods and these continue to be a particular problem for the Police Bureau. First response to "hot calls" is traditionally made by the officer who is closest, regardless of jurisdiction. Where these are within islands surrounded by Portland territory, this means that Portland officers often answer such calls first. Budget considerations may mean that these islands will need to be annexed using the island annexation method sometime in the future.

Program Staffing

The technical details of the Annexation Program staffing and budgeting have been handled jointly by the Portland Office of Fiscal Administration, Bureau of Planning, and Office of the Multnomah County Chair. In FY 83-84, the City created an Urban Services Division in the Office of Fiscal Administration with three professional staff members to coordinate City bureau activities, prepare Neighborhood Service Plans, develop intergovernmental agreements, resolve service issues, and promote citizen participation in City activities during and after annexation. Annexation casework was done in the Bureau of Planning. There, a full-time professional staff went from two in FY 83-84 to six in FY 85-86. The annexation staff developed and organized citizen support, developed the annexation proposals after gathering consents, answered service questions, obtained legal descriptions, drafted maps, and guided proposals through the City Council and Boundary Commission hearings.

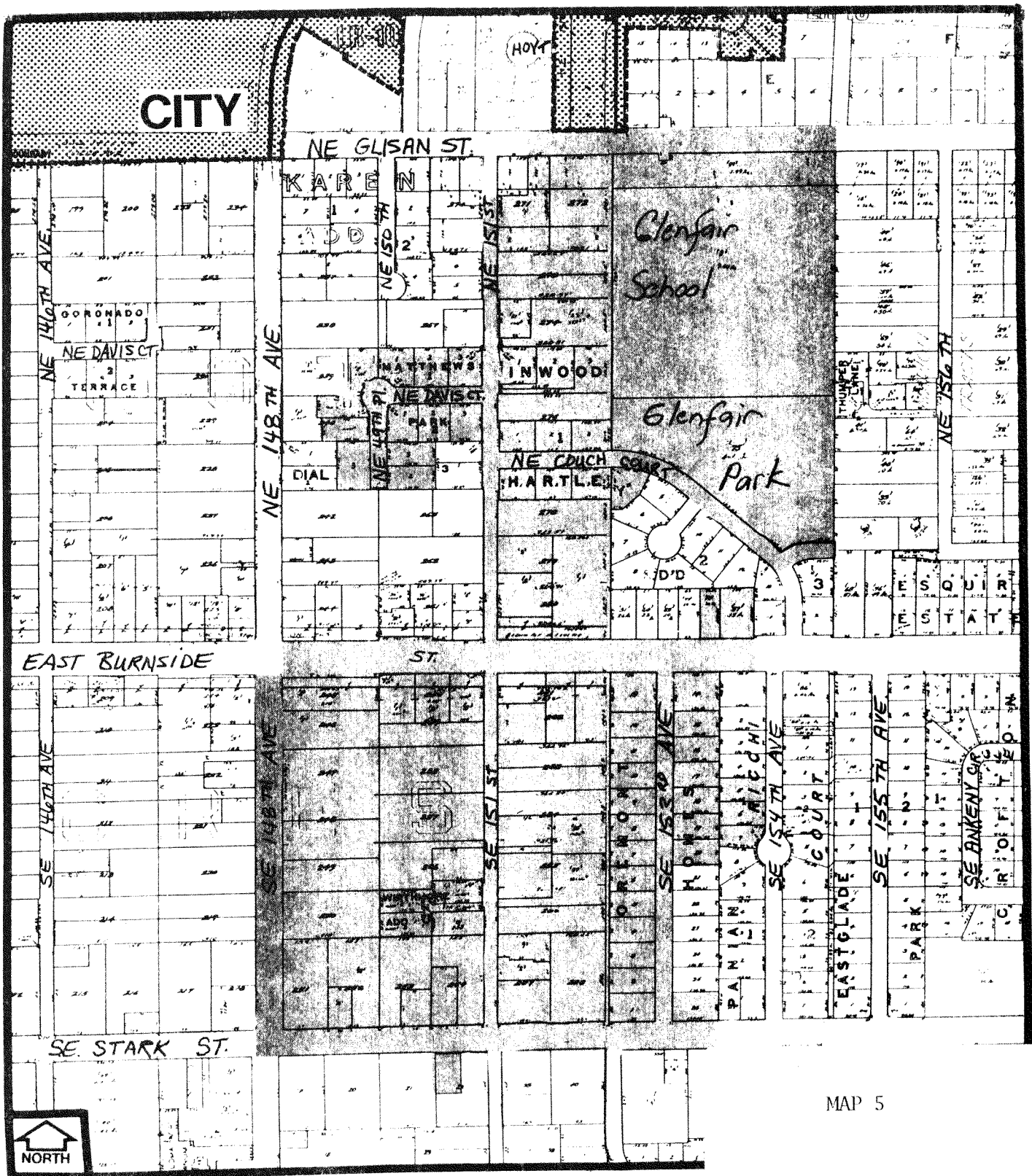
On December 23, 1987, the City Council passed an ordinance reorganizing the Office of Fiscal Administration by consolidating the Planning Bureau's Annexation Office into the Office of Fiscal Administration's Urban Services Division. The rationale for this change was that delivery of City services can be better insured if the annexation and urban service functions are within the scope of purview of the Fiscal Office, and to effect a cost-savings to the program.

Liaison between County and City staff was furnished by Staff Assistants from the County Executive's Office. This link to Multnomah County was helpful for several reasons, foremost among them were their ability to represent Multnomah County's position on the urban services issue, and, secondly, to provide direct day-to-day assistance in developing annexation proposals. Similar arrangements were made between Gresham and Multnomah County. Initially one staff person was assigned to the Portland annexation effort, beginning in FY 83-84. In FY 86-87, a City/County jointly funded canvassing team of up to ten persons joined the annexation staff to provide information door-to-door, to do surveying, and to gather consent petitions. Funding from Multnomah County ceased entirely at the beginning of calendar year 1988.



Boundary Commission Order No.: 2266
 Effective Date: July 24, 1986
 Description: SEE BACK OF MAP
 Vicinity: NE 157TH AND HALSEY 1/4 Section: 2846, 2946 Area: 29.46 AC
 Units: 100 SF, 28 MF, Population: 320 EST File No.: A-22-86 Scale: 1" = 400'

Annexation
 CITY OF PORTLAND



Boundary Commission Order No.: 2383

Effective Date: ~~October 8, 1987~~ December 31, 1987

Description: SEE BACK

Vicinity: EAST BURNSIDE ; 151ST 1/4 Section: 3045 - 3046 Area: 56.17 AC.

Units: 96 S.F. 50 M.F. 3 C. 2 CHUR. Population: 300 EST. File No.: A 487 Scale: 1" = 400'
1 SCHOOL, 1 PARK, PORTION OF MAX

Annexation
CITY OF PORTLAND

Service Bureau Impacts

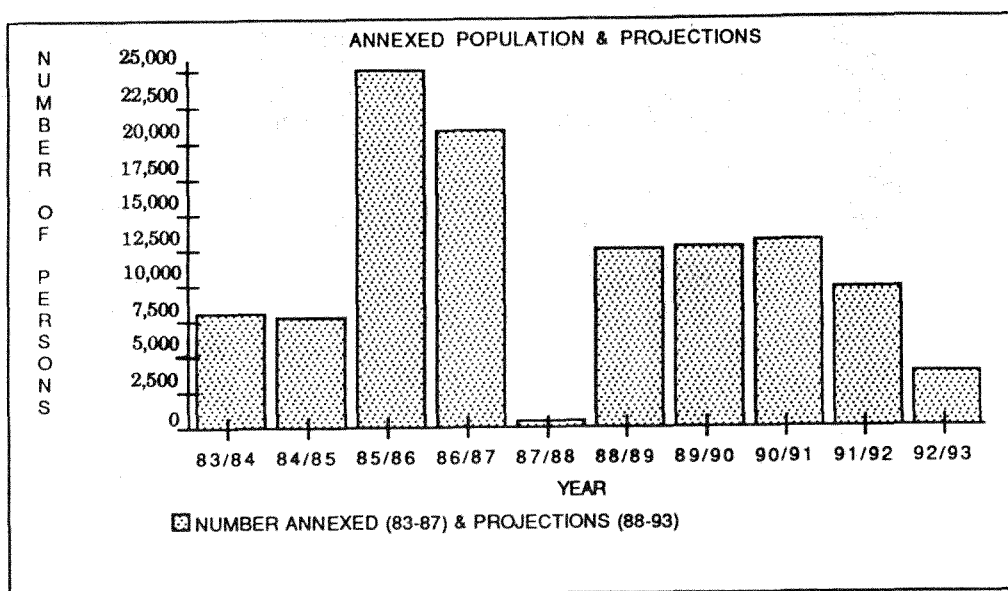
The accomplishments of the City's service bureaus in expanding their service areas and staffing levels to meet the added demand are impressive. Appendix 6 is a detailed summarization of service delivery accomplishments and expenditures.

At the start of the Annexation Program, City bureaus were asked to plan how they would serve the area if it were annexed. Thereafter, ongoing coordination of the Annexation Program with bureaus was accomplished by means of weekly Urban Services meetings. Major bureaus appointed special coordinators to handle the integration of new service areas. Bureaus which did so included the Fire and Police Bureaus, Office of Transportation, Office of Neighborhood Associations, Water Bureau, Bureau of Parks and Recreation, Bureau of Buildings, and Bureau of Environmental Services.

Service reports solicited by the Planning Bureau for each separate annexation proposal offered bureaus an opportunity to respond to the increase in responsibility as the program proceeded. As a result of this preparation, newly annexed areas have seen great improvement in their water and street systems, traffic management and public safety.

The pace of the program has been erratic during the past five years, for a variety of reasons discussed elsewhere. Graph B measures this pace in terms of population annexed per year. This past pattern has caused a great deal of hardship in the service delivery bureaus of the City. The projections for the next five years reflect a widely expressed desire among the service bureaus that a measured pace of activity occur.

Graph B:

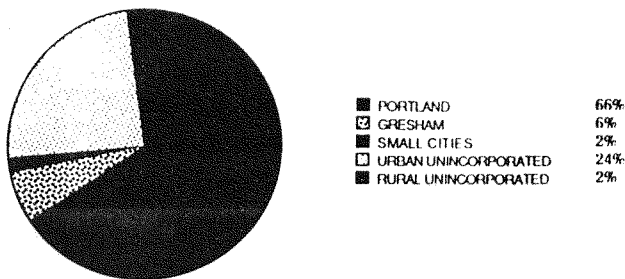


Multnomah County Impacts

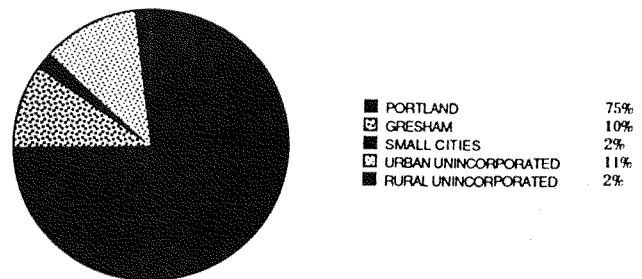
Improvements for the Multnomah County budget have been considerable due to the fact that it no longer has to provide urban services to nearly 80,000 people now annexed. As the County implemented Resolution "A" and the cities of Gresham and Portland implemented their respective Urban Services Policies, Multnomah County began to experience some net dollar savings. The savings are estimated at \$3.1 million annually, which has been reallocated, since 1984, to at least 17 different County programs (see Appendix 7).

Charts A and B:

DISTRIBUTION OF MULT.CO. POPULATION 1983



DISTRIBUTION OF MULT.CO. POPULATION: 1988



Prior to 1983, Multnomah County served the urbanized unincorporated area of the County in much the same way as a city normally does. Some people characterized Multnomah County as the third largest city in Oregon. Resolution "A" was the County's part of complementary City/County policies for dealing with the urban services needs of urbanized unincorporated Multnomah County. Provisions of the resolution stated that while Multnomah County would move out of providing municipal services and focus on countywide services, there would be an increasing responsibility for human services and corrections services. The cities of Portland, Gresham, and Fairview would offer their urban services upon annexation. Prior to these changes the County provided neighborhood police patrol at a level of service generally considered appropriate to an urbanized area. Park services were provided to the unincorporated area via nearly 40 developed parks and park sites. Road and street maintenance provided has been a mix of urban and rural levels of service depending on the nature of the street with some areas receiving street sweeping while others received ditch maintenance. Planning, zoning, and permit services provided also fell somewhere between urban and rural service levels. All these County service delivery systems have been significantly affected by the annexations to Multnomah County cities that have taken place since 1983.

The Sheriff's Office has experienced a decreasing level of service capacity for urban and rural areas and has participated in deputy transfers totalling 60 officers under the agreement providing for transfers. Since 1985, no further transfers have been triggered by

annexations. Police departments of Portland and Gresham regularly respond to calls for service, especially emergency calls, within the unincorporated area between the two cities.

Park maintenance was eliminated as part of the 1983-84 austerity budget forced on the County by the shortfalls which were in excess of \$14 million. The few developed parks, such as Brentwood and Ventura, fell into a state of decay and became unusable by the community, attracting vandals, drug users and other undesirable elements. The lack of maintenance led to a deterioration of the equipment and irrigation systems in the parks which required extensive repairs when the parks were transferred to the City. Even when receiving undeveloped park lands the City has also incurred significant "one-time fix-up" costs. Opportunities for developing previously undeveloped parcels have been forgone during the period since 1983 and new park sites have not been acquired to meet the needs of the unincorporated communities of the County.

A major restructuring of the County's road fund distribution formula was worked out in 1983 as part of the overall USP strategy. Some Multnomah County Road Department employees and equipment are still awaiting transfer to the City of Portland when annexation is complete. Maintenance on the remaining equipment is becoming increasingly expensive.

The County's planning and permit operations, like the other "urban services" previously mentioned, have also been in a state of transition. Although some planners and permit center personnel have been transferred to the City, the demand for planning services continues at nearly an urban level.

Members of the Board of County Commissioners have expressed their desire that annexation of the urban unincorporated parts of the County continue until everyone who desires urban services has an opportunity to receive those services.

Report of the City Auditor

In September 1986, the Portland City Auditor published a Report titled Financial and Service Impact of Annexations: An Urban Services Program Review.(10) It projected the end of FY 88-89 as the date when all of the area within Portland's Urban Services Boundary would be annexed, a date which is no longer achievable due to litigation and legislative action. However, the analysis by the Auditor is valuable as an indicator of general fiscal directions. Among the significant findings:

"The City's Urban Services Program will add approximately \$38.5 million annually in new General and Transportation Fund revenue when all areas are annexed. FY 1990-91 property tax revenues are estimated to increase by 27 percent, utility franchise fee revenues by 28 percent, business license fee revenues by 16 percent, and state and county sources by 90 percent. Approximately \$11.5 million will be derived from gasoline taxes, which by State Constitution is dedicated to transportation services. The City will also receive \$2.2 million annually in additional revenue for street lighting purposes."

and

"Excess revenues from the annexation program will be available to fund one-time-only start-up and capital costs that will face General and Transportation Fund bureaus.....start-up costs such as equipment, materials, and special maintenance expenditures account for approximately \$4.3 million, and major capital costs for buildings, parks, and other construction projects, account for almost \$22 million. The most significant one-time capital need facing the City is the \$12.6 million for improving and developing 28 neighborhood parks in the Mid-county area."

Up-front costs to the City have come in three general areas. First, until February 1987, the City pursued a policy of making annexations effective upon approval of the Boundary Commission rather than at the beginning of the fiscal year. This meant that the City "gave" services to newly annexed areas prior to receiving property taxes. Second, the actual cost of operating the annexation program should be considered an up-front cost of each annexation, to be repaid over future years. Finally, one-time start-up costs such as restoring neglected parks have been part of up-front costs.

The Auditor's bottom line on the analysis of the financial situation reads, in part:

"When the urban services area is fully annexed, we project that the City will receive approximately \$3.5 million annually in excess revenues over operating costs. However, significant start-up and capital expenditures, required to bring city-level services to the newly annexed areas, will absorb some of this excess revenue. During the first few years of the annexation program, the cost of extending city services has exceeded revenues generated from the urban services area. In addition, some service levels have declined due to citywide budget cuts and increased annexations workload. During the first three years of the Urban Services Program (FY 1983-84 through FY 1985-86), we estimate that revenues were not sufficient to cover bureau service costs and the City spent \$1.6 million more on the Urban Services Program than were received in revenues from the area."

Litigation

In 1986 the Oregon Court of Appeals issued an opinion that the triple majority annexation method was unconstitutional because it failed to provide electors with the same privilege enjoyed by property owners in making a decision on the question. Four annexations were affected directly by the ruling but over fifty-five cases were potentially affected. Defendants in the suit were the Boundary Commission and the City of Portland. These annexations, in total, included 36,000 people and land with an assessed value of \$1.1 billion.

The first phase of City response to this situation was assessment of the potential problems sure to ensue if challenge to the annexations was successful. Legal uncertainties abounded, as authority for tax levies, water district dissolutions and budget approvals for several jurisdictions had occurred on the basis of these shifts in population. Shifting the people back to their old service providers and taxing districts was not legally simple and the

resources were not available. The County Sheriff had been unable to serve these areas before the annexations had taken place and a contract had been necessary between Multnomah County and the City of Portland Police to serve them while they were still outside the City. The County was no better able to provide Sheriff protection to them now than it had been then. The Office of Fiscal Administration calculated that the City would have to reduce its expenditures citywide for the year by \$11 million to make up for having given services to the annexed areas. This would impact services to all of the residents of the City as well as a direct loss of services to the newly annexed areas.

The Supreme Court was asked to review the Oregon Court of Appeals ruling. Joining the defendants with briefs were Multnomah County, the League of Oregon Cities, and the City of Gresham. This legal process, however, involved the possibility that the Supreme Court would decline to review, and in any event might take an extended length of time to act. The jurisdictions affected by the ruling needed certainty about the situation in order to safeguard their budget processes and protect the public from serious service deficiencies.

The City asked Senator Glenn Otto, Chair of the Senate Committee on Operations and Elections, to introduce legislation that would provide a transition period should the Supreme Court uphold the Appeals Court decision. After Committee Hearings where newly annexed citizens spoke in strong support of the City's efforts, the Committee amended the legislation to provide for Legislative annexation of the affected parcels. This provided a permanent solution to the issue and was supported by the City. The Legislation, SB 556, ultimately passed both houses and eliminated the threat to the City and the citizens in newly annexed areas.

The Oregon Supreme Court dismissed the appeal of the lower court's decision on this question by saying that the legislative action of Senate Bill 556 had rendered the question moot. However, as expected, Senate Bill 556 has been challenged by annexation opponents. Failure of the Supreme Court to rule on the issue of the triple majority method of annexation leaves that technique under a legal cloud. The Office of the City Attorney provided a summary and status report regarding the various groups of litigation arising from the annexation activity of the past five years, which it is attached as Appendix 8.

Legislation

Oregon's conservative annexation statutes were modified during the 1987 Legislative session. The Legislature created a new double majority method of annexation. This method requires majority support both from property owners and voters, while providing cities with the same certainty as was a feature of triple majority. Appendix 9 summarizes each of the annexation methods prescribed in ORS.

Besides SB 556 and double majority, the 1987 Legislature amended the statutes relating to annexation in other important ways. House Bill 2863 and Senate Bill 9 together make several changes in ORS Chapters 199, 221 and 222 that are relevant to Portland's Annexation Program. Essential elements are as follows:

1. Appointment of Boundary Commissioners shifts from the Governor to the METRO Executive. Size of the Commission increases to 12. METRO is currently seeking applicants to serve on the newly reconstituted Boundary Commission beginning July 1, 1988.

2. Requirements for incorporation proposals are amended and Boundary Commission veto on new incorporations is prohibited through 1989.
3. New "double majority" method created. This is significant to Oregon cities, for it creates a new annexation method that replaces the triple majority. The double majority method requires declaration of the proposal boundaries of areas to be annexed in advance of soliciting signatures. This *intent* is filed with the Boundary Commission. Signatures on legal forms are then obtained from a majority of the registered voters, and from owners of a majority of the land area. Area to be annexed must be contiguous to the existing city boundary at time of filing intent.
4. "Triple Majority" method of annexation reaffirmed, although uncertain legal status makes it unlikely that this will be used again soon. In addition, the Portland City Council pledged to Representative Minnis in a letter during the 1987 legislative session that it would not use the triple majority method in future east Multnomah County annexations.

Metropolitan Area Annexation Activity

Of the several other cities within the Metro Urban Growth Boundary that have active annexation programs, Gresham's is perhaps the most vigorous. Gresham has annexed most of the area within its mid-County Urban Services Boundary and has grown from 34,340 in 1983 to about 55,000 in mid-1987. It actively pursued these annexations using canvassing methods similar to Portland's. It continued to use the triple majority method after the Appeals Court decision, and then switched to using the double majority method.

Beaverton has an active annexation program and has initiated several proposals. Hillsboro is processing large annexations of mostly industrial land in the Sunset Highway Corridor. Tigard has recently annexed Washington Square and part of the Metzger area. Milwaukie is currently looking at the economics of serving a larger area and is studying an Urban Services Boundary.

Several methods of annexation are being used. Beaverton and Tigard have used the City Council Resolution method of annexation with mixed results. Beaverton, for example, has lost three elections and won one during this past year. The other cities have processed generally small annexations using the 50% property owner consent method, and, at some risk, the triple majority method while it was under court appeal. Since July Gresham, Beaverton and Milwaukie have all begun to use the double majority method.

SECTION III: FISCAL ANALYSIS

This section provides an overall assessment of the fiscal and service level impact of the Urban Services and Annexation Program. It is arranged in four parts: a) impact on the City's General Fund, b) impacts on other City funds, c) impact on residents, and d) a summary and conclusion. This analysis addresses the Urban Services Program as it relates to Multnomah County areas only, i.e., it does not address potential costs or revenues associated with annexations in Washington or Clackamas Counties.

Part A: General Fund Fiscal Analysis

This analysis has employed a conservative set of assumptions for estimating both revenues and expenditures related to annexations. The City's accounting system does not allow segregation of costs and revenues associated with the Urban Services Program because it is not set up to account for the geographic location of services provided. Therefore, certain assumptions must be made concerning the actual cost of services provided and the revenue received from annexed territory. The most significant of these assumptions are outlined below.

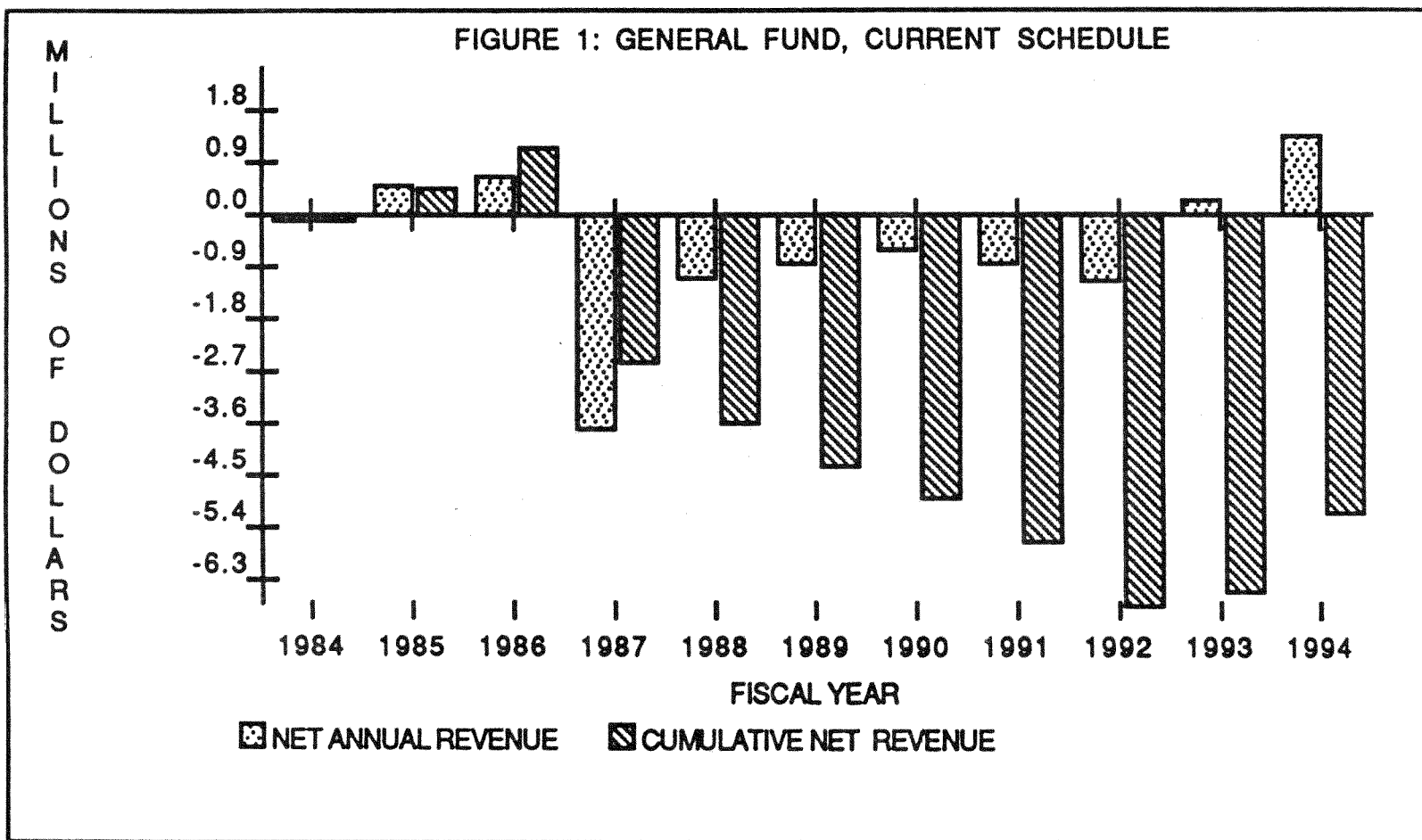
Expenditure Assumptions and Methodology

1. Urban services costs estimates for already completed annexations are based on actual budget packages in FY 1984 through FY 1988. budget packages have been adjusted for salary increases and actual expenditure levels at the bureau level for the year in which they were budgeted. It is assumed that these budget packages are built into a bureau's base service level in future years and that the packages provide service only to annexed areas.
2. Cost estimates for future annexations are based on service cost methodologies produced by the City's service bureaus and OFA over the past year. In general, these cost methodologies provide for an extension of current service levels on an average cost basis.
3. All costs are adjusted for inflation consistent with the assumptions contained in the current Five Year Financial Forecast.
4. Certain self-supporting costs, such as the portion of the Bureau of Buildings costs recovered through permit revenues, are not accounted for, since the off-setting revenue sources are also not counted.

----- Table 1 -----
 GENERAL FUND
 ANNEXATION/URBAN SERVICES PROGRAM COSTS VS. REVENUES
 CURRENT ANNEXATION SCHEDULE
 BY FISCAL YEAR

FISCAL YEAR	TOTAL ANNUAL REVENUE	TOTAL ANNUAL COST	NET ANNUAL REVENUE	NET REVENUE AS A % OF TOTAL REVENUE	CUMULATIVE NET ANNUAL REVENUE
1984	0	32,158	-32,158	.	-32,158
1985	1,927,510	1,416,125	511,385	26.5	479,227
1986	8,242,176	7,555,667	686,509	8.3	1,165,736
1987	9,075,167	12,716,748	-3,641,581	-40.1	-2,475,844
1988	13,378,981	14,430,341	-1,051,360	-7.9	-3,527,205
1989	14,175,489	14,951,485	-775,996	-5.5	-4,303,201
1990	16,532,971	17,042,049	-509,078	-3.1	-4,812,278
1991	19,020,167	19,786,378	-766,211	-4.0	-5,578,489
1992	21,697,404	22,800,485	-1,103,081	-5.1	-6,681,571
1993	25,419,955	25,174,492	245,463	1.0	-6,436,107
1994	27,679,584	26,329,944	1,349,640	4.9	-5,086,467
	=====	=====	=====		
	157,149,404	162,235,871	-5,086,467		

SOURCE: City of Portland, Office of Fiscal Administration



Revenue Assumptions and Methodology

1. Actual historic revenues from annexed areas are used where available, i.e., property tax, lodgings tax, business licenses. Two other revenue sources (utility licenses and State sources) were estimated by applying relationships between historic revenues, population, property values, and property classes to a data base generated from the County's assessment and taxation roll.
2. Revenues from future annexations were estimated in a similar manner, consistent with the assumptions in the Five Year Financial Forecast.
3. Only the principal five General Fund revenue sources; property taxes, utility licenses, business licenses, lodgings tax and State sources are accounted for. Other more minor sources such as interest income and miscellaneous sources are not counted even though they are expected to produce additional revenue.
4. The utility license revenue estimate is based on data previously unavailable to City staff. The use of this new data source (assessment and taxation file data) has resulted in revenue estimates that are about 50% lower than previous estimates.
5. Twenty-eight percent of utility license revenues are assumed to be transferred to the Transportation Fund.
6. Two separate General Fund scenarios were developed so that comparisons between program continuation and termination could be made in terms of fiscal impact on the City's General Fund; both in terms of annual and cumulative dollar impact.

General Fund Analysis

Overall, the program has come very close to meeting the goal of being self-supporting. Annexations produced a net revenue surplus to the General Fund in two out of the first three years (see Table 1). Beginning in FY 1987, program costs began to catch up to and exceed program revenues. A large increase in program budget packages in FY 1987 was due to a need to provide services to the 23,000 people annexed during FY 1986 and the 18,000 people that the City knew would be annexed during the first part of FY 1987. Much of the FY 1988 shortfall was recovered in FY 1988 as the property taxes from the prior annexations were received. Prior to February 1987, the City's policy was to allow effective dates for annexations in advance of receiving revenues, including property taxes, from the annexed areas.

On an annual basis, the program is expected to generate operating shortfalls through FY 1992 and then begin returning an operating surplus as the costs of operating the Urban Services/Annexation program are eliminated. As a percentage of total revenues received, these temporary shortfalls averaged 10.8 percent in Fiscal Years 1984 through 1988. In Fiscal Year 1989 through Fiscal Year 1992, the shortfalls will average 4.4 percent. Revenue surpluses averaging 3.0 percent will occur in fiscal 1993 and Fiscal Year 1994, the last two years of the program. Thereafter, revenue surpluses of around 5% should occur on an annual basis.

On a cumulative basis, program costs to the City of Portland are expected to exceed cumulative new General Fund revenues by about \$5.1 million or 3.2% over the eleven years from FY 1984 through 1994.

The "shortfalls" discussed represent an "investment" in this program by the City, either from City reserves, other revenues, or from reduced service levels. They are not true budgetary "deficits". The true "cost" of the shortfall is hard to measure since it was not documented in the past. Combined with other, underlying problems in City revenues that were recently reported in the five Year Financial Forecast, this "shortfall" has simply manifested itself as part of the City's budget problems. The impact of this "shortfall" is offset by a slight reduction in the property tax rate, which saves Portland taxpayers money, and by a reduction of the Urban Subsidy, which increases Multnomah County service levels within the City of Portland.

If one assumes that annexations do not continue, positive cash flows return to the General Fund in FY 1991 (see Table 2), compared to 1993 if the program continues along the proposed schedule (Table 1). In comparison, the audit performed by the City's internal auditors, reported initial surpluses for the General Fund in FY 1984 and 1987 (with two years of shortfalls in between), and also projected a General Fund surplus after all annexations were complete. The Auditors also reported that capital needs would consume net revenues for many years. The figures included in this report incorporate an allowance for certain capital items (e.g., office space and park rehabilitation) that were not covered in the Auditor's report on General Fund operating costs.

Another measure of the impact of this program is to compare the net financial results against the total General Fund. If the estimated cumulative shortfall of \$5.1 million over the term of the program is compared to estimated total General Fund requirements of nearly \$2.3 billion for the same period, the impact on the General Fund is less than three tenths of one percent.

In conclusion, urban services areas come very close to covering the costs of servicing them and eventually will meet and exceed General Fund costs. Beginning in FY 1993, revenues will exceed costs. An enhanced ability to estimate revenues, control urban services budgets and monitor expenditures is necessary to assure a reasonable balance between new costs and revenues. OFA has been developing and implementing such measures over the last year.

Part B: Analysis of Other City Funds

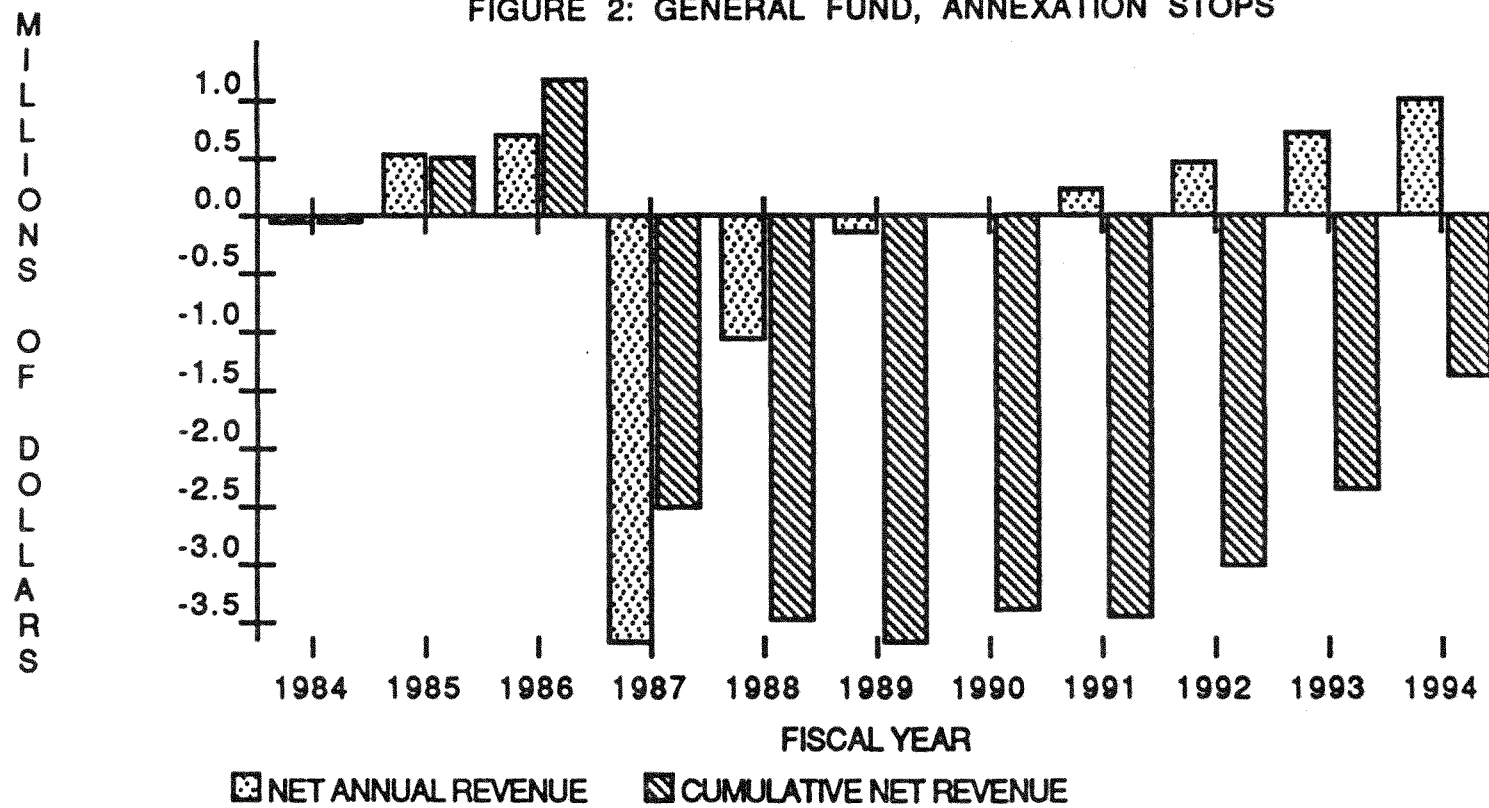
Several funds, in addition to the General Fund, are significantly affected by the urban services program. The Transportation Fund is positively affected and the Water Fund is negatively affected. The Bureau of Environmental Services is engaged in a massive sewer project in mid-Multnomah County. While this obviously has a major impact on the Sewage Disposal and other related funds, the project is not a function of annexation activity. Finally, the impact on the Fire and Police Disability and Retirement Fund is to reduce somewhat the rate of the property tax levy in the short run.

----- Table 2 -----
 GENERAL FUND
 ANNEXATION/URBAN SERVICES PROGRAM COSTS VS. REVENUES
 ASSUMING ANNEXATIONS STOP
 BY FISCAL YEAR

FISCAL YEAR	TOTAL ANNUAL REVENUE	TOTAL ANNUAL COST	NET ANNUAL REVENUE	NET REVENUE AS A % OF TOTAL REVENUE	CUMULATIVE NET ANNUAL REVENUE
1984	0	32,158	-32,158	.	-32,158
1985	1,927,510	1,416,125	511,385	26.5	479,227
1986	8,242,176	7,555,667	686,509	8.3	1,165,736
1987	9,075,167	12,716,748	-3,641,581	-40.1	-2,475,844
1988	13,378,981	14,430,341	-1,051,360	-7.9	-3,527,205
1989	14,161,812	14,285,946	-124,134	-0.9	-3,651,339
1990	14,756,152	14,760,741	-4,589	-0.0	-3,655,928
1991	15,456,061	15,242,429	213,632	1.4	-3,442,297
1992	16,192,749	15,746,282	446,467	2.8	-2,995,829
1993	16,972,858	16,286,971	685,887	4.0	-2,309,943
1994	17,799,596	16,846,558	953,038	5.4	-1,356,905
	=====	=====	=====		
	127,963,062	129,319,967	-1,356,905		

SOURCE: City of Portland, Office of Fiscal Administration

FIGURE 2: GENERAL FUND, ANNEXATION STOPS



Transportation Fund Analysis

The City's Transportation Fund receives revenues from three sources as annexations occur: 1) an increased allocation of State gas tax money directly to the City, 2) a larger proportion of the County's gas tax receipts from both the County gas tax and the State gas tax, and 3) a General Fund transfer of a proportion of the new utility license receipts generated by annexation. This analysis assumes that 28 percent of utility license receipts will be transferred from the General Fund to the Transportation Fund through FY 1994, consistent with the recently discussed Council policy.

The Office of Transportation has estimated operating costs for Urban Services areas through FY 1994. In addition, the Auditor's report on the Urban Services Program (September 1986) indicated that there is an annualized capital replacement need of approximately \$3.5 million for the entire urban services area, including those areas not yet annexed to Portland.

The revenue and expenditure impact of the Urban Services Program on the Transportation fund is outlined in Table 3. It appears that the Urban Services Program has produced and will continue to produce a positive cash flow for the Transportation Fund principally because of the County road agreement. Only the first three years of the eleven years in the analysis show negative net revenue. Over the eleven years the Transportation Fund should realize net revenue of approximately \$20 million. This net revenue effectively corrects the transportation part of the urban subsidy that has been documented several times by Multnomah County and by Portland State University over the past ten years.

Water Fund Analysis

According to the Water Bureau and the Auditor's Office, water rates will be slightly higher in the future because of annexation. The difference in rates will vary between three and five cents per hundred cubic feet of water between FY 1987 and FY 1994. This represents a 5.4 to 7.8 percent increase in rates over the period. These costs are detailed in Table 4.

While annexations are expected to increase water rates, there are off-setting benefits to the Water bureau that are generated by continuing the annexation program. These include:

1. The Water Bureau now pays \$41 per customer per year within partially annexed water districts as a "wheeling charge." This is a charge for using the facilities of the district to provide water to former customers of the district that now reside in Portland. Continuing the annexation program allows complete annexation of the districts, leading to their dissolution and the elimination of the wheeling charges. The Water Bureau estimates that annexation and dissolution of the remainder of the Richland Water District alone would generate savings of \$86,000 per year.
2. A timely completion of the annexation program will also produce savings to the Water Bureau. The Bureau has assumed in the past that annexation in Multnomah County would be substantially complete in FY 1990. The Bureau estimates that simply extending the program from a completion date of FY 1990 to a completion date of FY 1994 (which is one year past the proposed schedule) will add \$3.1 million in added cost and lost revenue.

----- Table 3 -----
 TRANSPORTATION FUND
 URBAN SERVICES PROGRAM COSTS VS. REVENUES
 BY FISCAL YEAR

09:08 Monday, March 28, 1988 1

FISCAL YEAR	TRANSPORTATION PLANNING COST	TRAFFIC MANAGEMENT COST	TRANSPORTATION ENGINEERING COST	MAINTENANCE COST	ANNUAL CAPITAL COST	TOTAL COST
1984	5,700	19,160	0	0	0	24,860
1985	11,000	50,490	501,417	2,834,305	87,601	3,484,813
1986	29,000	101,651	593,449	3,218,120	353,183	4,295,403
1987	45,000	131,185	828,631	4,336,529	610,968	5,952,313
1988	45,000	141,872	959,423	4,942,161	470,792	6,559,248
1989	51,695	162,353	1,038,261	5,325,911	1,966,727	8,544,947
1990	63,881	189,522	1,210,312	6,226,646	2,720,675	10,411,036
1991	76,383	213,806	1,399,040	7,254,593	3,201,158	12,144,979
1992	87,837	227,518	1,563,547	8,204,429	3,742,779	13,826,110
1993	94,474	236,297	1,692,611	8,822,509	4,226,877	15,072,768
1994	98,120	245,416	1,732,946	9,285,691	4,586,380	15,948,552
	=====	=====	=====	=====	=====	=====
	608,090	1,719,270	11,519,636	60,450,894	21,967,140	96,265,030

FISCAL YEAR	ROAD AGREEMENT REVENUE	STATE GAS TAX REVENUE	REVENUE TRANSFER FROM GENERAL FUND	TOTAL REVENUE	NET ANNUAL REVENUE	CUMULATIVE NET REVENUE
1984	0	0	0	0	-24,860	-24,860
1985	2,467,435	198,420	41,013	2,706,868	-777,945	-802,805
1986	3,647,878	505,586	284,584	4,438,048	142,645	-660,160
1987	6,083,895	1,066,367	445,283	7,595,545	1,643,232	983,072
1988	7,361,194	1,530,156	500,815	9,392,165	2,832,917	3,815,989
1989	8,705,645	1,729,360	521,862	10,956,867	2,411,920	6,227,909
1990	10,563,171	2,354,013	617,543	13,534,727	3,123,691	9,351,599
1991	12,023,392	2,873,990	704,988	15,602,370	3,457,391	12,808,991
1992	12,805,000	3,222,205	798,390	16,825,595	2,999,485	15,808,475
1993	13,292,893	3,426,961	872,674	17,592,528	2,519,760	18,328,235
1994	-	-	948,016	-	-	18,328,235
	=====	=====	=====	=====	=====	
	76,950,503	16,907,058	5,735,168	98,644,713	18,328,235	

SOURCE: Portland Office of Transportation

NOTES: a) Capital Costs in FY 1984 through FY 1988 are actual budgeted amounts. Capital costs in FY 1989 through FY 1994 are a proportioned amount of the \$3.5 million capital liability for the entire USB area identified by the Auditors Office.

b) All costs are inflated consistent with the Five Year Financial Plan.

c) Assumes County Road Agreement (Transportation Agreement) remains unchanged and that the general fund transfer to the Transportation Fund is 28% of Utility License Fee revenue.

----- Table 4 -----
WATER FUND
NET COST OF URBAN SERVICE PROGRAM TO PRE-USP CITY WATER USERS
BY FISCAL YEAR

11:19 Friday, March 25, 1988 1

FYB	WATER RATE WITHOUT ANNEXATION	WATER RATE WITH ANNEXATION	DIFFERENCE	CONSUMPTION PRE-USP CITY (X 100 CF)	NET REVENUE TO PRE-USP WATER USERS	CUMULATIVE NET REVENUE
1984	.	.	.	26,147,581	0	0
1985	.	.	.	26,147,581	0	0
1986	.	.	.	26,147,581	0	0
1987	0.52	0.55	-0.03	26,147,581	-784,427	-784,427
1988	0.56	0.59	-0.03	26,147,581	-784,427	-1,568,855
1989	0.58	0.62	-0.04	26,147,581	-1,045,903	-2,614,758
1990	0.60	0.64	-0.04	26,147,581	-1,045,903	-3,660,661
1991	0.62	0.66	-0.04	26,147,581	-1,045,903	-4,706,565
1992	0.64	0.69	-0.05	26,147,581	-1,307,379	-6,013,944
1993	0.66	0.71	-0.05	26,147,581	-1,307,379	-7,321,323
1994	0.69	0.73	-0.04	26,147,581	-1,045,903	-8,367,226
					=====	
					-8,367,226	

SOURCE: 1986 Urban Services Audit, and Portland Water Bureau

NOTE: Water rates are in dollars per 100 cubic feet of consumption.

3. Financial markets have recognized the urban services program as unique for a major central city. The program has been instrumental in retaining the City's Aaa bond rating, which produces cost savings every time the Water Bureau issues revenue bonds that are backed by the general taxing authority of the City.
4. By bringing wholesale water contract areas into the City, the urban services program promotes better management of the entire Bull Run distribution system, better control over water losses throughout the distribution system, and therefore improved management of the supply system. For example, the annexation of the Rose City Water District allowed the Water Bureau to complete a major distribution main replacement that has improved water distribution in both North Portland and Parkrose. The timing of the annexation also allowed the Bureau to install a properly sized main that meets long-term needs, rather than having to replace at a later date the smaller main that would have been installed by the Water District.

Bureau of Environmental Services

The 1986 analysis by the Auditor's Office indicated that the Urban Service program was revenue-neutral for the Bureau of Environmental Services. No further analysis was undertaken as part of this review.

Fire and Police Disability and Retirement Fund

This is an unfunded, pay-as-you-go, retirement and disability program financed by employee contribution and a continuing property tax levy authorized by the City Charter. There is a maximum rate cap of \$2.80 per thousand dollars of assessed value within the City. The program annually levies amounts necessary for projected expenses. In FY 1988, the tax rate levied is \$1.60.

Through FY 1988, annexations to Portland have resulted in a tax rate for the Fire and Police Disability and Retirement (FPDR) Fund that is approximately 25 cents per thousand dollars of assessed value less than it would have been otherwise. Table 5 shows the amount of rate reduction and the tax savings to Portland taxpayers.

The tax rate has been reduced because while annexation increased the assessed value of the City, the deputy sheriff and fire district personnel transferred to the City as the result of annexations are covered by the State retirement(PERS) and workers compensation systems. Benefits from these new personnel cannot be paid from the FPDR Fund. These costs have instead been covered by General Fund revenues. The cost to the General Fund is estimated to be about \$1.26 million per year. This is the equivalent of about nine cents per thousand dollars of assessed value within the General Fund property tax base. The previous General Fund analysis includes these costs.

As PERS-covered transferred employees retire or resign, their replacements must be covered under the existing FPDR program, according to City Charter. Therefore, in the future, FPDR Fund taxes are expected to rise to account for the needs of these new employees and General Fund expenses will diminish.

----- Table 5 -----
 FIRE AND POLICE DISABILITY AND RETIREMENT FUND
 BENEFIT TO CITY OF PORTLAND TAXPAYERS FROM LOWER FPDR FUND TAX RATES
 BY FISCAL YEAR

12:19 Friday, March 25, 1988

1

FISCAL YEAR	RATE DIFFERENCE DUE TO ANNEXATION	ASSESSED VALUE OF PORTLAND (thousands \$)	ANNUAL BENEFIT TO PORTLAND TAXPAYERS
1984	0.01	11,866,835	118,668
1985	0.11	12,816,729	1,409,840
1986	0.13	13,281,037	1,726,535
1987	0.17	13,701,671	2,329,284
1988	0.25	14,475,324	3,618,831
			=====
			9,203,158

SOURCE: City of Portland, Office of Fiscal Administration

NOTE: Tax rate difference is in dollars per thousand assessed value.

Part C: Analysis of Impact on City Residents and Taxpayers

As discussed in Part A, the urban services program has had a slightly negative impact on the General Fund in FY 1987 and FY 1988. The estimated impact was 1.8 percent of total General Fund requirements in FY 1987, about one-half of one percent in FY 1988. Over the period of this analysis, the average impact on the General Fund is less than three-tenths of one percent per year. It is virtually impossible to assess the impact of this "shortfall" in terms of services received by citizens. This is especially true since the City can deal with the shortfall by contributing reserves, relying on other revenues, reducing transfers from the General Fund or by reducing service levels. As reported in the Financial Forecast recently presented to the City, the impact of this program is modest compared to other revenue and expenditure issues facing the City.

This slightly negative impact on City residents is off-set by lowered property taxes, reductions in the urban subsidy and higher service levels from Multnomah County. Service levels in annexed areas are dramatically improved over where they were prior to annexation.

Urban Subsidy

The potential negative impact on City service levels is offset by increases in County service levels within incorporated areas. The annexation programs of both Portland and Gresham have resulted in less unincorporated population for Multnomah County to serve, providing more resources to spend on countywide services that are equally available to Portland and unincorporated area residents. (See discussion of the "urban subsidy" in Section I of this report.)

Because of annexation, Multnomah County has documented savings of approximately \$3.1 million annually in police, planning and building regulation services that it once provided only in unincorporated areas. The County has used those "new" resources to increase the services that it provides on a countywide basis such as justice and health services and on animal control. These represent service increases to City residents. As annexations continue, the savings to Multnomah County and the increase in County services to Portland and other City residents should grow. Table 6 outlines the potential benefits to the residents of Multnomah County cities based only on the current level of \$3.1 million in annual savings.

Service Impacts in Annexed Areas

The service level impact in areas that have been annexed has been much more dramatic. Police protection levels have more than doubled. Neighborhood parks are being reclaimed from neglect. Long-standing nuisances are being abated. Neighborhoods are organizing themselves because the City has provided a real means of affecting the types and quantities of services that are delivered to them. A comprehensive listing of services delivered and service-level changes in annexed areas is included in the appendix.

----- Table 6 -----
 URBAN SUBSIDY REDUCTION
 BENEFITS TO RESIDENTS OF MULTNOMAH COUNTY CITIES
 BY FISCAL YEAR

12:47 Friday, March 25, 1988 1

FISCAL YEAR	INCREASE IN COUNTY-WIDE SERVICE LEVEL	PORTLAND SHARE OF BENEFIT	GRESHAM SHARE OF BENEFIT	TROUTDALE SHARE OF BENEFIT
1984	0	0	0	0
1985	1,800,000	1,202,356	113,528	21,434
1986	3,000,000	2,042,916	191,371	35,723
1987	3,100,000	2,239,594	221,543	36,914
1988	3,100,000	2,346,583	291,062	36,914
1989	3,100,000	2,348,945	296,622	36,914
1990	3,100,000	2,412,888	296,622	36,914
1991	3,100,000	2,478,143	296,622	36,914
1992	3,100,000	2,545,538	296,622	36,914
1993	3,100,000	2,595,439	296,622	36,914
1994	3,100,000	2,615,035	296,622	36,914
	=====	=====	=====	=====
	29,600,000	22,827,438	2,597,233	352,466
FISCAL YEAR	FAIRVIEW SHARE OF BENEFIT	WOOD VILLAGE SHARE OF BENEFIT	MAYWOOD PARK SHARE OF BENEFIT	UNINCORPORATED AREA SHARE OF BENEFIT
1984	0	0	0	0
1985	5,775	7,957	2,647	446,303
1986	9,738	13,262	4,412	702,580
1987	10,062	13,704	4,559	573,624
1988	10,062	13,704	4,559	397,117
1989	10,062	13,704	4,559	389,195
1990	10,062	13,704	4,559	325,252
1991	10,062	13,704	4,559	259,997
1992	10,062	13,704	4,559	192,602
1993	10,062	13,704	4,559	142,701
1994	10,062	13,704	4,559	123,105
	=====	=====	=====	=====
	96,011	130,848	43,527	3,552,476

SOURCE: Multnomah County Budget Office, and
 City of Portland, Office of Fiscal Administration

NOTE: The increase in county-wide service level is not inflated nor assumed
 to increase, even though future annexations will produce additional
 County general fund savings.

Taxation Impacts

The net General Fund "shortfall" described in Part A and the potential for slightly reduced service levels are also offset by the slightly lower property taxes that pre-USP City residents and businesses are paying because of annexations (see discussion of the Fire and Police Disability and Retirement Fund in Part B). Net property tax savings are listed in Table 5.

The changes in taxation are much more pronounced in annexed areas. Annexed properties begin to pay Portland's property tax levy in the fiscal year following their annexation. The average annual cost, after subtracting the special district tax levies that they do not pay following annexation, usually falls in the range of \$150 to \$250 for a single-family home. Businesses pay the City's business license tax. The City's utility license fee is assessed to both businesses and residents. The bottom line for annexed areas is that they no longer receive subsidized services from the County. They begin to pay their own way through taxes and fees paid to the City. In return, these new residents receive much higher levels of service, and sometimes new services that have not been available to them in the past.

Part D: Fiscal Analysis Summary

As best as can be determined, territory annexed under the urban services program does meet the goal of self-support by the end of the program and returns surpluses thereafter. While the short-term negative impact is fairly modest in the context of the entire City budget, it comes as a time when the City is working hard to adjust its expenditures to ongoing revenues without serious reductions in essential services. It is apparent that the Transportation Fund will continue to benefit from the urban services Transportation Agreement with Multnomah County for as long as that agreement remains in place. It is also clear that City residents are benefitted by a lower property tax rate and by increases in County services, thus reducing the urban subsidy.

Weighing the various costs and benefits of the urban services program against each other is a complex and difficult task. Some funds are positively affected and others are negatively affected. There are potential impacts on service levels and on the City's general finances. There are benefits that the program produces, such as increased opportunities for economic development, reasserting the role of Portland as the region's central city, and improving services and neighborhood quality in the annexed areas, that are very difficult to quantify. Comparing these opposing factors is like comparing apples to oranges. However, Table 7 lists the measurable costs and benefits to the General, Transportation and Water Funds, along with the benefits to City taxpayers of reductions in property taxes and the urban subsidy resulting from the Urban Services Program.

In conclusion, the program will require a slight General Fund subsidy until its completion. For purposes of comparison, this subsidy is less than the operating subsidies associated with the Performing Arts complex. In return, the City completes what will ultimately be its final East side boundaries and sets the tone of the City's role in the region for the future. Only the Council can weigh the "cost" of this subsidy with the long-term benefits to the City's future.

----- Table 7 -----
SUMMARY OF URBAN SERVICES PROGRAM COST/BENEFIT
TO CITY OF PORTLAND RESIDENTS AND TAXPAYERS
BY FISCAL YEAR

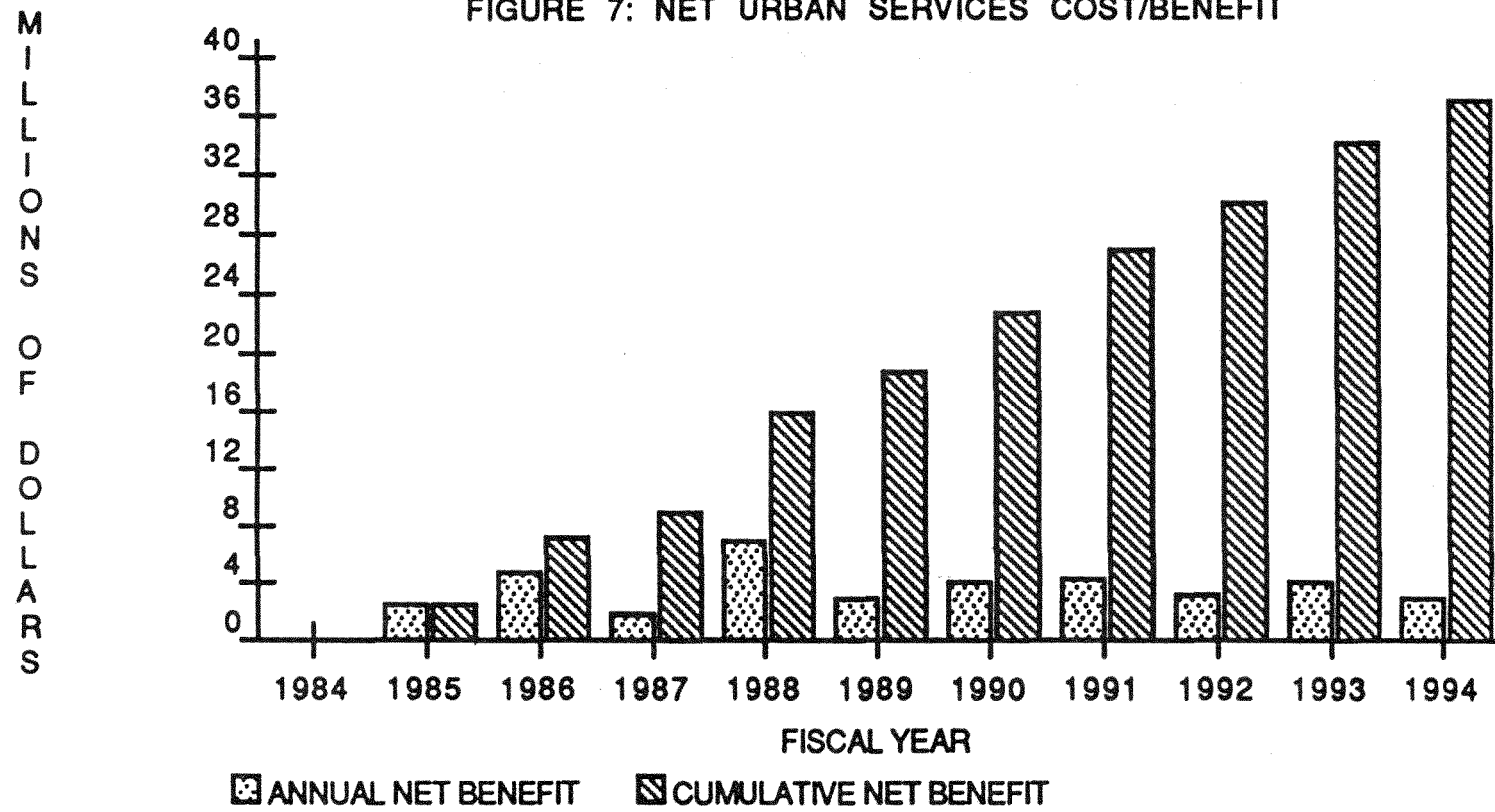
09:39 Monday, March 28, 1988 1

FYB	GENERAL FUND NET REVENUE	TRANSPORTATION FUND NET REVENUE	WATER FUND NET REVENUE	BENEFIT FROM URBAN SUBSIDY REDUCTION	BENEFIT FROM LOWER FPDR TAX RATES	ANNUAL NET BENEFIT	CUMULATIVE NET BENEFIT
1984	-32,158	-24,860	0	0	118,668	61,650	61,650
1985	511,385	-777,945	0	1,202,356	1,409,840	2,345,637	2,407,287
1986	686,509	142,645	0	2,042,916	1,726,535	4,598,605	7,005,892
1987	-3,641,581	1,643,232	-784,427	2,239,594	2,329,284	1,786,102	8,791,994
1988	-1,051,360	2,832,917	-784,427	2,346,583	3,618,831	6,962,543	15,754,537
1989	-775,996	2,411,920	-1,045,903	2,348,945	-	2,938,965	18,693,502
1990	-509,078	3,123,691	-1,045,903	2,412,888	-	3,981,598	22,675,100
1991	-766,211	3,457,391	-1,045,903	2,478,143	-	4,123,420	26,798,521
1992	-1,103,081	2,999,485	-1,307,379	2,545,538	-	3,134,563	29,933,084
1993	245,463	2,519,760	-1,307,379	2,595,439	-	4,053,282	33,986,366
1994	1,349,640	-	-1,045,903	2,615,035	-	2,918,772	36,905,138
	=====	=====	=====	=====	=====	=====	
	-5,086,467	18,328,235	-8,367,226	22,827,438	9,203,158	36,905,138	

SOURCE: City of Portland: Office of Fiscal Administration
Office of Transportation
Water Bureau
Office of the Auditor
Multnomah County: Budget Office

NOTE: Benefits from the urban subsidy reduction and lower FPDR tax rates go to Portland residents and taxpayers. They are not a direct benefit to the City budget or any of its funds.

FIGURE 7: NET URBAN SERVICES COST/BENEFIT



SECTION IV: CONCLUSION AND RECOMMENDATIONS

The Urban Services Policy and Annexation Program have important implications for the future of Portland. On the large scale, a Pacific Rim economy is emerging which promises to dominate in the next century. The size and strength Portland attains in the near term sets the stage for our stature in that important arena. Closer to home, major rearrangement of local government resources has taken place due to the annexation of some 55,000 people and \$1.86 billion worth of real estate to Portland during the past four years.

When the program began in 1983 the population of Portland was 365,000, but by December, 1987 the City had officially grown by 55,144, to 420,144. When annexations to Portland are completed in Multnomah County, the City population will be approximately 467,000, which is about the posted size of Seattle.

Several other cities in the metropolitan region have or are in the process of developing their own urban service policies and boundaries. Portland has developed such a boundary agreement with Clackamas County, to the south, and is now negotiating such an agreement with Washington County to the west. The figures provided included data for Multnomah County only, and are not based upon possible annexations to the south and west.

The adoption of these policies by the City and County Commissioners culminated a decade of study, debate, and earlier attempts at finding a solution to the urban subsidy. Portland and Multnomah County led the way in adopting and implementing these policies to better serve their respective, often overlapping, constituencies equitably.

The specific goal is successful implementation of the USP and Resolution "A" using an intensive citizen participation process as the impetus for action. The means is annexation of developed, unincorporated Multnomah County neighborhoods within Portland's Urban Service Boundary. The objectives of this program are:

- to eliminate the urban subsidy in Multnomah County;
- to provide City and County services economically and efficiently, with minimal duplication;
- to develop a cooperative spirit involving various interests and citizens;
- to increase economic development opportunities and provide infrastructure to undeveloped tracts near the Columbia River and Portland International Airport;
- to increase Portland's political, economic, and social standing in the region;
- to increase the City's fiscal base while maintaining its AAA municipal bond rating;
- to increase the City population by more than 25%, to nearly 500,000; and
- to nurture a strong, growing Central City.

At this point it appears that Multnomah County has reaped more direct benefit from the policy and program than has the City. Their financial problems have been reversed as their municipal service delivery area has been reduced. City residents are now getting better service from the County for their County tax dollars.

Portland, on the other hand, is faced with increased service demands citywide plus an increased service area. Although a strict financial analysis of the program indicates a negative revenue flow for the City in the short term, the broader benefits of the program outweigh that factor. The program has captured national attention as one of 90 jurisdictions selected from a field of some 970 pre-applications accepted into an awards competition recognizing innovations in local government, sponsored by the Ford Foundation and the JFK School of Government at Harvard University.

The Economic Development Advisory Committee, established in 1980 to produce an economic development policy for Portland, was reconvened in 1987. Among their findings in a February, 1988 report to City Council was the following:

"The annexation program appears to present another opportunity for better coordination. The region's business and government leaders have identified annexation as critical to the region's long-range economic prosperity(emphasis added). After four years of dramatic results--nearly 70,000 new residents in Portland and Gresham--court decisions have muddled future annexations. A renewed commitment and increased cooperation between City and County officials is needed to keep the program on track."

The report went on to propose a 1988 Economic Development Policy Update, which includes policy statements in various categories. Goal D under Coordination reads as follows:

D. To coordinate with counties, cities and special service districts in the region to ensure that the annexation and urban services program is completed expeditiously.

A model aspect of the program is the high level of cooperation between City and County. By coming to similar conclusions and adopting analogous policies, Portland and Multnomah County broke new ground for local intergovernmental cooperation and the coordination achieved in this process is a departure from past relations. But, because of the change, Portland is expanding its municipal service area by one-quarter, and Multnomah County has actually restructured its service responsibilities to deal with the pressing countywide issues of criminal incarceration and human services. The political obstacles associated with this program are an ongoing part of the process. The range of issues runs from potential for change in the political leadership, to jurisdictional "turf" disputes, to organized opposition.

It is helpful to consider the USP and Annexation Program by looking at them from different perspectives. Historically, the pattern of growth and annexation exhibited by the advent of the USP echoes earlier times of growth in Portland, and it is similar to that of other urban areas. Today a number of Oregon cities, counties, and special districts are

working on this issue, developing policies and implementation techniques modeled on the Portland/Multnomah County experience. Geographically, the activity occurring now will shape Portland's stature as a major West Coast city and Pacific Rim port into the 21st century. Financially, most indicators show more net benefit than loss in the long term with completion of the annexation program. Politically, the Urban Services Policy is valid today for all the same reasons it was valid when adopted in 1983. The end result will be a stronger City, a more effective County, and a well-served constituency.

Staff Recommendations

Based on the stated objectives of the program and the conclusions summarized herein, staff makes the following recommendations:

1. Ratification of the Urban Services Policy by the City Council.
2. Continuation of the Annexation Program in Multnomah County.
3. Support a moderate, and measured, pace of annexation designed to complete the program in Multnomah County in about 5 years.
4. Flexibility in bringing annexations before Council by various statutory means, as individual cases warrant.
5. Actively solicit annexation support under the terms of the Double Majority Method.
6. Initiate annexations under the terms of the Island Method in special instances, such as real service deficiencies or a test of cost-effectiveness.
7. Except for special cases, the effective date for annexations should be the last day of each Fiscal Year.
8. Continue to monitor performance of the program through on-going fiscal analysis, and service planning for the targeted neighborhoods.
9. Maintain both the political and financial support of Multnomah County through the completion of the program.
10. Continue regional coordination and complete the process determining an Urban Services Boundary to the west, in Washington County.

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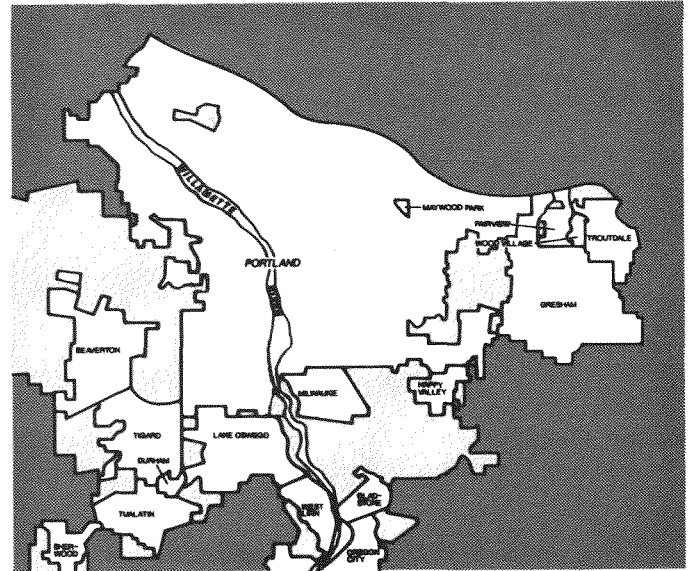
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CITY OF PORTLAND
Office of Fiscal Administration
Urban Services Division
1120 S.W. 5th, Room 1250
Portland, Oregon 97204



CITY OF PORTLAND **URBAN** **SERVICES POLICY**

December, 1987



J.E. Bud Clark
Mayor

Dick Bogle
Commissioner

Mike Lindberg
Commissioner

Earl Blumenauer
Commissioner

Bob Koch
Commissioner

APPENDIX 1

For Further Information, Contact:
City of Portland
Office of Fiscal Administration
Urban Services Division
1120 S.W. 5th, Room 1250
Portland, Oregon 97204
796-6847

WHEREAS, the City of Portland finds there is a need for a higher level of urban services in the urbanized, unincorporated area surrounding Portland, and that it is in the City's interest to participate in resolving the service needs; and

WHEREAS, the City recognizes the integrated nature of the metropolitan area and the essential role of the central city and wishes to enhance the economic well-being of the entire area; and

WHEREAS, the present lack of services constrains the region's economic growth and its residential, commercial and industrial development; and

WHEREAS, the service deficiencies may also create long-term health hazards for the region; and

WHEREAS, the City has established the existing physical, financial and institutional capacity to serve a wider area, particularly for the most costly, capital-intensive services such as sanitary sewage collection and treatment and drinking water; and

WHEREAS, future jobs for City residents depend upon timely provision of a full range of urban services to developable industrial sites, while many of the region's potential industrial sites presently unserved are located within the City's rational service area, but outside present City boundaries; and

WHEREAS, the City finds it must establish an urban services boundary to know where it will ultimately be responsible for providing services so that it may efficiently plan, design, finance, and construct facilities to serve both existing and prospective areas; and

WHEREAS, the City's Comprehensive Plan calls for an urban services boundary, prepared in coordination with Multnomah County and adjacent jurisdictions; and

WHEREAS, the City of Portland finds Portland taxpayers may bear a significant cost of future services to the urbanized, unincorporated area surrounding Portland, even if these services are delivered by other jurisdictions, and that there is a need to spread the cost of providing urban services in the region more equitably among all residents and property owners receiving services; and

WHEREAS, the City finds that the most cost effective and rational method for the delivery of urban services within the urban services boundary is through full-service city government but is prepared to consider other service delivery approaches that may be effective and efficient, such as contract agreements with those desiring City services; and

WHEREAS, the City is prepared to provide property owners and residents in portions of the urbanized, unincorporated area with the option of receiving urban services from Portland upon request of those desiring such services;

NOW THEREFORE, BE IT RESOLVED by the Council of the City of Portland that the City of Portland hereby adopts the following Urban Services Policy:

1. The City shall establish, in cooperation with neighboring jurisdictions, an urban services boundary for the City of Portland that defines a rational service area within which the City can meet the service needs most effectively and at the lowest cost. The urban services boundary shall be approved by the City Council upon completion of the public process provided for amendment of the City's Comprehensive Plan and may be amended from time to time in accordance with this policy and the Comprehensive Plan.

2. The City shall acknowledge its role as principal provider of urban services within the established boundary and plan for the eventual delivery of urban services according to a phased program of improvements meeting the service needs of individual areas.
3. The City shall coordinate closely with other jurisdictions providing services within the established Portland urban services boundary to ensure continuing delivery of effective and efficient urban services.
4. The City shall consider requests for delivery of services within the urban services boundary wherever the following conditions exist:
 - A majority of residents and property owners within an area to be served desire delivery of services by the City of Portland.
 - The City can meet the new demands without diminishing its ability to serve existing City of Portland residents and businesses.
 - The City can supply the needed services most effectively and efficiently.
 - The City can expect to recapture its service investment.
5. The City shall deliver services within the urban services boundary by means of annexation to Portland or, on an interim basis, through alternative approaches that are demonstrated to be in the best long-term interest of both the City and future service areas.
6. The City shall consider delivery of services to areas outside the established City of Portland urban services boundary only where the City determines that there is a clearly defined need for each service, that expansion of the urban services boundary and full-service provision by the City are not appropriate, that the conditions in number 4., above, are met and that improved services may be expected to enhance the City's ability to meet the service needs of existing City residents and businesses.
7. The City shall initiate and maintain a public education program within the Portland urban services boundary to inform residents and property owners of the need, benefits and costs to deliver City of Portland services within that area. The City will coordinate this public education program with similar efforts by service providers and community organizations operating in the Portland metropolitan area.
8. The City shall provide for a process of public participation in the implementation of this policy, assuring that property owners, residents, and existing community organizations in areas affected by proposed changes in service delivery have opportunity to review and comment on plans for such changes.

BE IT FURTHER RESOLVED that nothing in the Urban Services Policy shall be construed to amend or repeal the City of Portland's existing service and annexation commitments stated in Resolutions 31762 and 32750.

Adopted by the Portland City Council
February 23, 1983

RESOLUTION A

BEFORE THE BOARD OF COUNTY COMMISSIONERS

OF MULTNOMAH COUNTY, OREGON

In the matter of Phasing Out of Delivery of)
Urban Level of Services in the Unincorporated)
Area of Multnomah County during the next three) RESOLUTION
years (Resolution A))

WHEREAS, the Board of County Commissioners is considering the mission and purpose of Multnomah County; and

WHEREAS, the 150,000 persons currently residing within Multnomah County's urban growth boundary outside incorporated cities require long-range planning for services; and

WHEREAS, it is in the public interest to clearly express the County's mission regarding providing services in mid-Multnomah County; and

WHEREAS, Multnomah County's resources are insufficient to continue current service levels and the government is facing a significant revenue shortfall of approximately \$14 million in general resources for FY 1983-84; and

WHEREAS, the first priority for the available resources of Multnomah County shall be for those services available to all residents of the County, such as Assessment and Taxation, Elections, Corrections, Libraries and Health Services; and

WHEREAS, "municipal services" is defined as governmental services usually provided by city governments and shall include but not be limited to police service, neighborhood parks, and land-use planning and permits, "urban" shall be defined as governmental service comparable in quantity and quality to incorporated municipalities, and "rural" shall be defined as governmental service comparable in quantity and quality to unincorporated service areas outside urban growth boundaries.

THEREFORE BE IT RESOLVED, that County services generally described as "municipal services" at a level considered "urban" rather than "rural" shall be proportionately reduced starting FY 1983-84 through FY 1986-87 to establish a minimal and essentially rural level of municipal services throughout Multnomah County.

ADOPTED March 15, 1983

RESOLUTION

33210

WHEREAS, in excess of 150,000 persons currently reside within Multnomah County's urban growth boundary outside incorporated cities; and

WHEREAS, municipal services are currently being delivered to residents within unincorporated Multnomah County by an array of governmental entities; and

WHEREAS, residents in these urbanized unincorporated areas lack sufficient municipal services, including but not limited to adequate sewer and treatment plant facilities, coordinated police protection, and a well-maintained system of roads and parks; and

WHEREAS, several governmental units and other organizations are currently working to solve the problems of unincorporated Multnomah County without City participation; and

WHEREAS, Portland City taxpayers currently provide an "urban subsidy" which supports municipal services in the unincorporated areas; and

WHEREAS, ongoing efforts by other governments and individuals to solve urban service problems in unincorporated Multnomah County involve concepts that may significantly impact the City, including substantial additional subsidies by city taxpayers to finance prospective improvement projects; and

WHEREAS, the Portland Comprehensive Plan includes policy provisions encouraging as a matter of regional policy that urban and urbanizable areas in the Portland Metropolitan Area shall be in an incorporated city; and

WHEREAS, the ability to provide adequate urban services to unincorporated areas is necessary to ensure future economic growth and the creation of new jobs for Portland area residents; and

WHEREAS, development of available commercial and industrial property may be significantly inhibited if necessary urban services are not provided; and

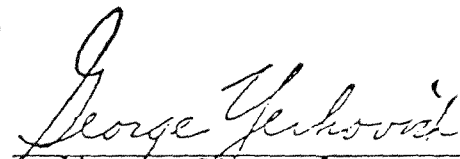
WHEREAS, the City of Portland is the principal jurisdiction in the metropolitan area with the financial and institutional capacity to deliver a full range of municipal services;

THEREFORE BE IT RESOLVED that the Council directs the Office of Fiscal Administration and Intergovernmental Affairs, and the Bureau of Planning to jointly develop and propose an urban services policy to be presented to the Council on or before September 15, 1982; and

BE IT FURTHER RESOLVED that the process to develop such an urban services policy shall:

- .promote and encourage public awareness and involvement in the formulation of an appropriate Portland urban services policy and in identifying solutions to the area's urban services problems; and
- .encourage cooperation with other governmental units and organizations currently addressing the issue of needed services outside current City boundaries; and
- .address as the immediate priority, municipal services in mid-Multnomah County; and
- .discourage premature actions that would foreclose thorough examination of the issue and study of alternative responses; and
- .allow for public input including the opportunity to respond to the proposed policy submitted to Council; and
- .establish a task force of City bureau managers to develop an action plan that defines the extent of and constraints on the City's ability to adequately deliver services to currently unincorporated areas, and to examine the fiscal implications and other impacts of service delivery options not involving the City; and
- .state the City's intended role in delivering services to nearby unincorporated areas, including a definition of service boundaries, the nature of services to be provided, a rationale for proposed boundaries and services, and a suggested implementation process and a financial plan.

Adopted by the Council: JUL 14 1982



Auditor, City of Portland

Mayor Francis J. Ivancie
Mark Gardiner/Bob Van Brocklin/lau
July 9, 1982

INTERGOVERNMENTAL AGREEMENTS

Multnomah County Resolution A
Portland Urban Services Policy
Gresham Urban Service Agreement
Multnomah Fire District #10 Agreement
Clackamas Fire District #1 Agreement
Portland/Gresham Fire District #10 Agreement
Urban Services Transition Agreement
Police Service Transition
Sheriff's Sworn Personnel Agreement
Multnomah County Non-Sworn Personnel Agreement
Transportation, Personnel and Equipment Agreement
Signal & Street Lighting Agreement
Road Jurisdiction Transfer
City-County Service Evaluation Task Force Ordinance
Columbia Corridor Task Force
Airport Way Advisory Committee
Inverness Sewer Agreement
Sewer Consortium Activities
Sanitary Sewer Operations & Maintenance Agreement
Parkrose Water District
Rose City Water District
Powell Valley Water District
Sylvan Water District
Other Water District Agreements (in process)
Parks Master Plan -- County/Portland/Gresham
Neighborhood Park Property Transfers (ongoing)
Cable Television Franchise Amendment
Building Permit Inspection Transition
Land Use Transition (partial 7/1/84)
City/County Area Agency on Aging
City/County Emergency Basic Needs Task Force
Lodging Tax Collection and Transfer Agreement
Annexation Petitions for County Owned Land

ANNEXATIONS BY CASE NUMBER

PAGE 1

1981 CASE NUMBERS												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
SE 174TH & POWELL	A-19-81	2054	10/17/84	11/15/84	11/15/84	3	3.2	11	SE 174TH & POWELL	15	7	834,000
1983 CASE NUMBERS												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
COLUMBIA SOUTH SHORE	A-8-83	1963	10/5/83	11/11/83	11/11/83	3	1423	9	NE 122ND-185TH/MARINE DR-SANDY BLVD	95	42	66,765,000
SE 52ND & BYBEE	A-11-83	1962	10/5/83	11/11/83	11/11/83	3	12.5	10	SE 5ND & BYBEE	198	90	3,056,000
ARGAY TERRACE	A-12-83	1967	10/28/83	12/8/83	12/8/83	3	516	09-13	NE 122ND-148TH/SANDY BLVD-BANFIELD	5200	2334	164,688,000
SE 45TH & MALDEN	A-13-83	1961	10/5/83	11/11/83	11/11/83	3	0.5	10	SE 45TH & MALDEN	3	2	66,000
NE 105TH & SIMPSON	A-14-83	1976	9/14/83	1/12/84	1/12/84	3	1	9	NE 105TH & SIMPSON	2	1	37,000
GATEWAY SHPNG CTR	A-16-83	1968	10/28/83	12/8/83	12/8/83	3	34.5	5	NE 102ND & HALSEY	0	0	9,917,000
DAVIS	A-17-83	2033	7/18/84	8/23/84	8/23/84	3	0.3	10	ERROL HEIGHTS BLK 24&25	0	0	17,000
ARGAY TERR EAST	A-19-83	2017	5/23/84	6/28/84	6/28/84	3	25.5	9	NE 142-145TH/SHAWER-MILTON	356	127	11,292,000
WOODLAND PARK	A-20-83	1981	1/4/84	3/29/84	3/29/84	3	18.3	5	NE 102ND & HALSEY	233	98	5,003,000
PARKROSE/112TH-122ND	A-21-83	2018	5/30/84	6/28/84	6/28/84	3	167	9	NE 112TH-122ND/SANDY-FREMONT	1310	594	28,962,000
SE 85TH & LAFAYETTE	A-22-83	1983	12/28/83	2/9/84	2/9/84	3	0.3	11	SE 85TH & LAFAYETTE	0	1	35,000
SE 45TH & JOHNSON CR BLVD	A-24-83	1998	2/16/84	4/5/84	4/5/84	3	0.6	10	SE 4TH & JOHNSON CR BLVD	0	0	31,000
1984 CASE NUMBERS												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
GROUNDWATER WELL SITE	A-3-84	1995	2/1/84	3/8/84	3/8/84	3	0.9	9	NE 185TH-SO OF MARINE DR	0	0	8,000
POWELL/82ND-92ND	A-4-84	2012	4/25/84	5/31/84	5/31/84	3	4.4	5	SE 90TH & POWELL	25	15	859,000
NE 102ND & MULTNOMAH	A-5-84	2010	4/25/84	5/31/84	5/31/84	3	0.9	5	NE 102ND & MULTNOMAH	0	0	586,000
SYLVAN HEIGHTS	A-7-84	2041	8/22/84	9/20/84	9/20/84	3	49.7	15	QS 3123	207	95	10,580,000
SE 85TH & BROOKLYN	A-9-84	2009	4/25/84	5/31/84	5/31/84	3	1.7	11	SE 85TH & BROOKLYN	7	5	167,000
NE 92ND & BROADWAY	A-12-84	2011	4/25/84	5/31/84	5/31/84	3	1.1	10	NE 92ND & BROADWAY	10	4	148,000
LEONARD SERDAR	A-13-84	2032	7/18/84	8/23/84	8/23/84	3	1.6	15	5095 SW BARNES RD TL195 SEC 6 131E	2	1	108,000
JAMES ULRICH & MARILYN LEWALL	A-14-84	2030	7/18/84	8/23/84	8/23/84	3	0.8	4	12145 SE BROOKSIDE LOT 3, PLATE #2	3	1	56,000
JAMES & JANET KASAMEYER	A-15-84	2031	7/18/84	8/23/84	8/23/84	3	0.4	15	S 5' OF LOT 11, LOT 12	4	1	95,000
PARKROSE INDUSTRIAL	A-16-84	2061	11/7/84	12/13/84	12/13/84	3	114.3	9	2441 & 2541	152	65	12,810,000
PARKROSE HEIGHTS	A-17-84	2065	12/12/84	1/10/85	1/10/85	3	222.9	5	112TH TO 122ND HALSEY TO PRESCOTT	2528	1146	63,650,000
AIRPORT INDUSTRIAL PARK	A-18-84	2060	11/7/84	12/13/84	12/13/84	3	105.6	9	QS2438 & 2439	0	0	19,455,000
1985 CASE NUMBERS												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
PARKROSE ADD	A-1-85	2078	1/30/85	3/25/85	3/25/85	3	134.1	9	NE 102ND-112TH/SANDY-FREMONT	1392	637	31,333,000
PORT AIR	A-2-85	2077	2/6/85	3/28/85	3/28/85	3	53.3	9	NE 82ND/COL-ALDERWOOD RD	0	0	5,983,000
VILLA DE SHIRLEY	A-3-85	2087	2/27/85	3/28/85	3/28/85	3	1.1	5	NE 102ND AND HOLLADAY	49	22	798,000
PARKROSE HEIGHTS	A-4-85	2086	2/27/85	3/28/85	3/28/85	3	266	5	NE 111TH & FREMONT	2510	937	59,272,000
BEDFORD PK WD	A-6-85	2123	5/22/85	6/27/85	6/27/85	3	71.6	14	NE 77TH/KILLINGSWORTH PRESCOTT	77	37	9,282,000
MALL 205	A-7-85	2136	6/12/85	7/25/85	7/25/85	3	308.1	05-11	SE 102ND & STARK	1103	450	105,840,000
SACRAMENTO SCHOOL	A-8-85	2126	5/22/85	6/27/85	6/27/85	3	10	5	NE 117TH & SACRAMENTO	0	0	1,924,000
PARKROSE HIGH & MIDDLE SCHOOL	A-9-85	2124	5/22/85	6/27/85	6/27/85	3	51.8	9	NE 122ND & PRESCOTT	2	1	14,619,000

APPENDIX 5

ANNEXATIONS BY CASE NUMBERS

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1985 CASE NUMBERS (CONT)												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
SANDY CREST	A-10-85	2125	5/22/85	6/27/85	6/27/85	3	118.2	9	NE 152ND & SANDY BLVD	306	157	6,884,000
RIVERGATE/UNION PACIFIC	A-11-85	2122	5/22/85	6/27/85	6/27/85	3	83.2	10	N COL&TERMINAL RD	0	0	2,817,000
ROSE CITY #1	A-13-85	2139	6/26/85	7/25/85	7/25/85	3	315	10-14	NE COL-FREMONT/NE 42ND-78TH	2133	929	66,417,000
CLIFGATE #1	A-14-85	2137	6/12/85	7/25/85	7/25/85	3	178.2	5	NE 122ND & HALSEY	1228	483	45,883,000
WILKES/HIGHWOOD	A-16-85	2138	6/19/85	7/25/85	7/25/85	3	61.8	9	NE 162ND-FARGO & NE 148TH & MILTON	239	117	10,416,000
TRI-MET TRANSIT SITE	A-17-85	2190	10/9/85	12/12/85	12/12/85	3	3.1	5	NE 99TH & HOLLADAY	0	0	328,000
PARKROSE HTS #3	A-18-85	2152	8/14/85	10/17/85	10/17/85	3	14.6	5	NE 106TH & HALSEY	223	202	8,162,000
LEACH GARDEN PK	A-19-85	2149	8/14/85	10/17/85	10/17/85	3	130.6	4	122ND & FLAVEL	214	80	5,658,000
SANTAMA	A-20-85	2167	10/9/85	11/14/85	11/14/85	3	11.5	13	NE 153RD & HALSEY	122	53	4,890,000
PARKROSE INDUST ISL	A-21-85	2151	8/14/85	10/17/85	10/17/85	3	19.7	9	NE 115TH & MARX	45	20	2,853,000
CHERRY PARK/KELLY BUTTE	A-22-85	2184	11/13/85	1/9/86	1/9/86	3	210.5	11	SE 96TH & DIVISION	558	235	30,785,000
ERROL HEIGHTS	A-23-85	2150	8/14/85	9/19/85	9/19/85	3	12.6	10	SE 45TH-52ND/DUKE-MALDEN	143	63	2,239,000
OCTOBER HILL	A-24-85	2168	8/14/85	11/14/85	11/14/85	3	3.8	16	SW SHATTUCK & PATTON	6	3	387,000
ROSE CITY II	A-25-85	2166	10/9/85	11/14/85	11/14/85	3	20.5	9	NE 82ND & PRESCOTT	199	96	4,423,000
BRENTWOOD NORTH	A-26-85	2181	11/6/85	12/12/85	12/12/85	3	10.9	10	SE 57TH-60TH/DUKE-COOPER	64	26	1,183,000
JOHN TODD	A-27-85	2165	10/9/85	DENIED 11/85	NONE	DENIED BY E	0					
ROSE CITY ISLAND	A-28-85	2182-83	11/6/85	12/12/85	12/12/85	ISLAND	780.1	10-14	NE 52ND & COLUMBIA	5731	2585	106,536,000
CLIFGATE II	A-29-85	2178	11/6/85	1/9/86	1/9/86	3	97.9	05-12	NE 122ND & BANFIELD	703	263	26,801,000
HOLCOMB HEIGHTS	A-30-85	2208	1/29/86	4/3/86	5/21/86	3	48.4	9	NE 162ND & STANTON	596	202	19,447,000
PARKROSE HEIGHTS IV	A-31-85	2179	11/6/85	12/12/85	12/12/85	3	0.5	5	NE 111TH & HALSEY	0	0	237,000
BURNSIDE CORRIDOR	A-32-85	2238	4/23/86	5/29/86	5/29/86	3	65.8	5	E BURNSIDE & I-205	538	233	14,441,000
TERRITORIAL TRANSFER TO MILWA	A-33-85	2177	11/6/85	12/12/85	1/27/86	TT	-0.6	7		-8	-3	-134,000
ROBINBROOK	A-35-85	2225	3/26/86	5/1/86	5/21/86	3	24.4	13	NE 162ND & BANFIELD FWY	199	88	4,048,000
SPOONER	A-36-85	2195	1/2/86	3/6/86	5/21/86	3	116	10	SE 72ND-82ND/FLAVEL-CLATSOP	1027	543	22,525,000
BRENTWOOD SOUTH	A-37-85	2235	5/21/86	6/26/86	6/26/86	3	80.6	02-10	SE 54TH-62ND/KNAPP-LAMBERT	474	208	7,180,000
DIVISION STREET	A-38-85	2209	1/29/86	3/6/86	5/21/86	3	108.6	11	SE 122ND & DIVISION	921	527	27,867,000
DON RAY	A-39-85	2224	2/26/86	5/1/86	5/21/86	3	1.3	1	HARBORTON	0	0	17,000
GATEWAY NORTH	A-40-85	2272	6/18/86	7/24/86	7/24/86	3	33.8	5	NE 106TH & HASSALO	312	136	11,110,000
VERMADA PARK	A-41-85	2196	12/18/85	2/6/86	5/21/86	3	22.9	05-10	SE 112TH & MARKET	194	71	5,981,000
RICHLAND/GLENDOVEER	A-42-85	2207	2/5/86	3/6/86	5/21/86	3	355.2	05-12	NE 148TH & HALSEY	975	366	38,345,000
1986 CASE NUMBERS												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
CRYSTAL SPRINGS	A-1-86	2206	1/29/86	3/6/86	5/21/86	3	21.6	10	SE 82ND-89TH/CRYSTAL SPG-CLATSOP	99	47	1,751,000
82ND AVE MOTELS	A-2-86	2210	1/29/86	3/6/86	5/21/86	ISLAND	58.4	9	82ND & SANDY	0	0	31,112,420
FLOOD OAK	A-3-86	2210	1/29/86	3/6/86	5/21/86	ISLAND	50	9	NE 122ND&MARX(SEE A-2-86 FOR VALUE)	0	0	0
DARLINGTON	A-5-86	2227	2/26/86	5/1/86	5/21/86	3	45.6	03-10	SE 52ND-57TH/FLAVEL-CLATSOP	318	150	6,810,000
CHERRY PARK II	A-6-86	2216	2/26/86	4/3/86	5/21/86	3	43.6	11	SE 105TH & DIVISION	421	157	13,511,000
OGDEN-KNAPP	A-7-86	2226	2/26/86	5/1/86	5/21/86	3	3.6	10	SE 50TH & KNAPP	55	30	927,000
102ND AVENUE	A-8-86	2217	2/26/86	4/3/86	5/21/86	3	32.4	5	NE 102ND & BURNSIDE	420	185	12,974,000
MARKET STREET	A-9-86	2237	4/23/86	5/29/86	5/29/86	3	56.3	05-11	SE 117TH & MARKET	263	106	10,577,000

ANNEXATIONS BY CASE NUMBER

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1986 CASE NUMBERS (CONT)												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
MT CALVARY	A-10-86	2254	5/21/86	7/24/86	7/24/86	3	230.1	15	BARNES ROAD	78	36	10,254,000
HOLGATE	A-11-86	2239	4/23/86	5/29/86	5/29/86	3	73.7	10-11	SE 104TH & HOLGATE	475	251	13,088,000
BRENTWOOD COMMUNITY	A-12-86	2253	5/21/86	6/26/86	6/26/86	3	134.7	02-03-10	SE62ND-78TH/OGDEN-CLATSOP	1542	678	24,803,000
REGENCY PARK	A-13-86	2264	6/18/86	7/24/86	7/24/86	3	36.7	5	NE 134TH & HALSEY	279	105	11,649,000
MURMURING PINES	A-14-86	2236	4/23/86	5/29/86	5/29/86	3	21	13	NE 152ND & HOLLADAY	210	83	6,903,000
BINNSMEAD SCHOOL	A-15-86	2248	5/21/86	6/26/86	6/26/86	3	12.8	11	SE 87TH & LINCOLN	89	39	2,068,000
122ND CORRIDOR	A-16-86	2247	5/21/86	6/26/86	6/26/86	3	153.3	05-11	122ND HALSEY TO DIVISION	1178	518	59,049,000
W POWELLHURST NORTH	A-17-86	2249	5/21/86	6/26/86	6/26/86	3	33.1	11	SE 87TH & CLINTON	183	80	4,671,000
LINCOLN STREET	A-18-86	2265	6/18/86	7/24/86	7/24/86	3	25.9	11	SE 114TH & LINCOLN	310	121	6,262,000
W POWELLHURST SOUTH	A-19-86	2250	5/21/86	6/26/86	6/26/86	3	18.9	11	SE 86TH & RHONE	209	92	4,065,000
BRENTWOOD WEST	A-20-86	2252	5/21/86	6/26/86	6/26/86	3	2	10		23	10	405,000
TWETEN PARK	A-21-86	2251	5/21/86	6/26/86	6/26/86	3	2.5	13	NE 153RD & HOLLADAY	17	7	592,000
WILKES-GLENDOVEER	A-22-86	2266	6/18/86	7/24/86	7/24/86	3	29.5	13	NE 157TH & HALSEY	242	95	6,283,000
SUMNER/PARKROSE	A-23-86	2267	6/18/86	7/24/86	7/24/86	3	80.9	9	NE 92ND & PRESCOTT	822	382	20,783,000
POWELL VALLEY	A-24-86	2316	10/9/85	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
WOODMERE	A-25-86	2268	6/18/86	7/24/86	7/24/86	3	12	10	SE DUKE-BYBEE/76TH-80TH	98	39	2,842,000
BRENTWOOD EAST	A-26-86	2269	6/18/86	7/24/86	7/24/86	3	32.4	10	SE DUKE-FLAVEL/62ND-72ND	491	198	7,517,000
OGDEN TERRACE	A-27-86	2270	6/18/86	7/24/86	7/24/86	3	17.1	10	SE DUKE-KNAPP/54TH	76	36	5,212,000
GATEWAY SOUTH	A-28-86	2271	6/18/86	7/24/86	7/24/86	3	33.1	5	NE 108TH & GLISAN	367	160	10,167,000
GATEWAY ISLAND	A-29-86	2281	7/16/86	8/21/86	11/5/86	ISLAND	116.6	05-10	NE 108TH & WEIDLER	1087	478	23,192,000
BRENTWOOD/DARLINGTON ISLAND	A-30-86	2279	7/16/86	8/21/86	11/5/86	ISLAND	493.4	02-03-10	SE45TH-82ND/DUKE-CLATSOP	4582	2015	72,722,000
PARKROSE ISLAND	A-31-86	2282	7/16/86	8/21/86	11/5/86	ISLAND	328.7	9	NE82ND-122ND/BANFIELD-SANDY	2267	997	85,883,000
CHERRY PK ISLANDS I	A-32-86	2278	7/16/86	8/21/86	11/5/86	ISLAND	80.2	05-11	SE 101ST-122ND/MARKET-DIVISION	760	334	15,938,000
POWELLHURST ISL	A-33-86	2283	7/16/86	8/21/86	11/5/86	ISLAND	148.5	11	SE 83RD-92ND/DIVISION-GLADSTONE	1197	527	22,730,000
FREMONT VILLAGE CONDOS	A-34-86	2280	7/16/86	8/21/86	11/5/86	3	6.4	9	NE 162ND & FREMONT	92	40	2,817,000
STANTON ISLAND	A-35-86	2277	7/16/86	8/21/86	11/5/86	3	14.9	5	NE 122ND-127TH/MORRIS-KNOTT	209	92	4,744,000
ARDENWALD TT TRANSFER	A-36-86	2351	1/21/86	3/12/86	3/12/86	TT	-0.79	7	SE 36TH & ROSWELL	0	-1	-85,140
HAYDEN ISLAND COMMERCIAL	A-37-86	2304	8/13/86	10/16/86	11/5/86	3	161.3	6	I-5 & N HAYDEN ISLAND DR	254	112	85,054,000
VERMADA PARK II	A-38-86	2293	8/13/86	9/18/86	11/5/86	3	7.1	5	SE 110TH & CHERRY BLOSSOM DR	103	45	2,527,000
MILLCOURT PARK	A-39-86	2305	9/10/86	10/16/86	11/5/86	3	3.7	11	SE 122ND & STEPHENS	22	10	528,000
JANET ADDITION	A-40-86	2306	9/10/86	10/16/86	11/5/86	3	2	5	SE 123RD & SALMON	25	11	576,000
NE 102ND & PACIFIC	A-41-86	2292	8/13/86	9/18/86	11/5/86	3	1.5	5	NE 102ND & PACIFIC	12	2	820,000
GLISAN CORRIDOR	A-42-86	2291	8/13/86	9/18/86	11/5/86	3	10.9	5	NE 112TH & GLISAN	99	44	3,332,000
GATEWAY ISLAND II	A-43-86	2310	9/10/86	11/5/86	10/16/86	11/5/86	263.3	5	NE 113TH & GLISAN	2656	1168	77,213,000
HAZELWOOD	A-44-86	2307	9/10/86	10/16/86	11/5/86	3	17.9	5	NE 114TH & HOLLADAY	158	69	4,182,000
HERITAGE PARK	A-45-86	2317	10/14/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
I-205 / ROCKY BUTTE	A-46-86	2290	8/13/86	9/18/86	11/5/86	3	16.8	9	I-205 & ROCKY BUTTE	0	0	438,000
BARBARA WELCH LANE	A-47-86	2308	9/10/86	10/16/86	11/5/86	3	0.8	8	SE 146TH & BARBARA WELCH LN	6	2	81,000
162ND & POWELL	A-48-86	2313	10/9/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
MILL/CHERRY ISL II	A-49-86	2309	9/10/86	10/16/86	11/5/86	ISLAND	124.5	05-11	SE117TH & MORRISON	1771	779	31,530,000
SE 111TH	A-50-86	2315	10/9/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---

ANNEXATIONS BY CASE NUMBER

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1986 CASE NUMBERS (CONT)												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
GLENFAIR SOUTH	A-51-86	2314	10/9/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
HAYDEN RESIDENTIAL	A-53-86	2337	12/3/86	1/15/87	3/2/87	CCINT	199.7	6	EAST END HAYDEN ISLAND	810	356	35,641,000
POWELL VALLEY 'C'	A-55-86	2318	10/14/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
SCOTT'S PARK	A-58-86	2327	11/5/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
104TH & SCHILLER	A-59-86	2326	11/5/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
FAIRWAY TERRACE	A-60-86	2325	11/5/86	DENIED 10/87	NONE	@ REQ CC	0	---	---	---	---	---
PANAVISTA	A-61-86	2323	11/5/86	12/11/86	12/11/86	ISLAND	12.4	15	NW SKYLINE & THOMPSON	52	23	2,750,000
ISLAND LEFTOVERS	A-63-86	2324	11/5/86	12/11/86	12/11/86	ISLAND	0.9	05-09	---	3	1	477,000
1987 CASE NUMBERS												
Case name	Case #	BC #	CC DATE	BC DATE	EFFECTIVE DATE	METHOD	ACRES	WTR DIST	VICINITY	POPULATION	UNITS	VALUE
LYNCHWOOD	A-1-87	2420	6/24/87	7/30/87	DEFEATED 11/3/87	CC INT	0	---	---	---	---	---
WEST GLENDOVEER	A-2-87	2385	4/29/87	6/4/87	DEFEATED 9/15/87	CC INT	0	---	---	---	---	---
EAST LENTS	A-3-87	2384	4/29/87	6/4/87	DEFEATED 9/15/87	CC INT	0	---	---	---	---	---
GLENFAIR	A-4-87	2383	4/29/87	6/4/87	12/31/87	CC INT	56.2	05-13	---	362	160	11,096,000
BARNES PARK HEIGHTS	A-6-87	2419	6/24/87	DENIED 7/87	WITHDRAWN	0.5	0	---	---	---	---	---
EAST EAST LENTS	A-7-87	2423	6/24/87	7/30/87	DEFEATED 11/3/87	CC INT	0	---	---	---	---	---
KELLY BUTTE	A-8-87	2422	6/24/87	7/30/87	DEFEATED 11/3/87	CC INT	0	---	---	---	---	---
LAYTON	A-9-87	2387	NONE	6/4/86	7/20/87	OWNER INT	4.2	16	SW PATTON ROAD	2	1	387,000
RUSSELL ST. WILKES	A-12-87	2432	8/19/87	9/24/87	---	CC INT	110.18	13	NE 159TH-162ND/BANFIELD-SACRAMENTO	90	37	1,967,700
HAMILTON	A-15-87	2421	NONE	8/27/87	10/12/87	OWNER INT	0.31	17	CLOVER HGHTS-QS3722	2	1	109,000
								01-BURLINGTON	02-COMMUNITY	03-DARLINGTON		
								CODE 04-GILBERT	05-HAZELWOOD	06-JANTZEN BEACH		
								FOR 07-MILWAUKIE	08-MT SCOTT	09-PARKROSE		
								WTR 10-PORTLAND	11-POWELL VALLEY	12-RICHLAND		
								DIST 13-ROCKWOOD	14-ROSE CITY	15-SYLVAN		
								16-VALLEY VIEW	17-METZGER			

APPENDIX 6

CITY OF PORTLAND
SERVICE DELIVERY ACCOMPLISHMENTS
IN NEWLY ANNEXED AREAS
MARCH 23, 1988

POLICE PROTECTION

- The City has more than doubled the level of police protection in annexed areas. The Sheriff's Office provides a service level of .74 officers per thousand population. The City provides a service level of 1.70 officers per thousand. Response times have also improved with annexation. On average, it takes a Portland patrol unit 20-30 percent less time than a Sheriff's patrol unit to get to a call.
- The City has added five patrol districts (units) in annexed areas since 1983; the same number of districts (units) that the Sheriff's Office has for all of unincorporated Multnomah County from Sauvie Island to Cascade Locks.
- The City and the County have entered into several agreements on police services aimed at providing a smooth transition of service responsibility as annexations proceed. Among those is an agreement to transfer Sheriff Deputies to the City based on calls for service or population annexed, whichever results in the higher number of transfers. Approximately sixty deputies have been transferred to the City to date. The City and County are now negotiating for future additional transfers.
- The Portland Police Bureau has responded to over 100,000 calls for service in all areas that have been annexed since November 1983.
- Approximately 28,000 of the above calls for service occurred before the areas were annexed primarily under the terms of the Urban Services Transition Agreement. This service cost over \$5 million and was mostly unreimbursed. The Police Bureau continues to make first response to priority calls in unincorporated areas per mutual response arrangements.
- The Brentwood Darlington Neighborhood Association has eliminated twenty-three drug houses from their neighborhood. By working with each other and the City Brentwood/Darlington has reduced their burglary rate by 50%. The City has allocated \$750,000 for major water line and fire hydrant improvements in the Brentwood/Darlington (Errol Heights) neighborhood.

FIRE PROTECTION

- Rural Fire Protection District #10 and Clackamas County Fire District #1 have functionally merged with the Portland Fire Bureau. Former District #10 and District #1 employees have become City Fire Bureau employees.

- Consolidation has reduced service overlap and duplication reducing operating costs for both the City and the Fire District. It has also eliminated the adverse impact of annexation on the District.
- Because of the Hayden Island community's decision to annex to Portland, the City agreed to maintain a fire station and EMS services on the island.

PARKS AND RECREATION

- Portland, Multnomah County and Gresham jointly developed a Master Plan for mid-County parks in 1984. The City has agreed to implement the plan as it accepts and improves annexed parks.
- The City has annexed 20 and accepted title to 15 mid-County parks.
- Portland has spent more than \$600,000 (through FY 87-88) restoring 14 mid-County parks to a safe and usable condition. These "one-time fix ups" include restoring unworkable irrigation systems, repairing or removing dangerous and vandalized equipment, restoring turf and fields, cleaning up brush, pruning overgrown trees and bushes, and installing tables, benches, and signs.
- Ongoing maintenance costs on the parks the City has accepted so far amounts to over \$660,000 annually.
- The redevelopment of Knott Park began in FY 87-88 with first phase expenditures of \$60,000. A long-term development plan for the park has been adopted.
- Portland's extensive recreation programs are now more available to newly annexed neighborhoods. The Park Bureau is working with the mid-County school districts to set up two Community School Programs next year that will provide specialized and summer recreation programs on a neighborhood basis.
- A landscaped median strip in NE Fargo Street has been renovated at a improvement cost of \$28,700 and ongoing maintenance of \$7,700 annually.
- Portland has acquired 14 acres of surplus State of Oregon property at SE Powell and 100th Avenue that will be developed as a new neighborhood park within five years. Two neighborhood planning meetings have occurred.
- A total of over \$2.5 million has been spent in annexed areas on park improvements, maintenance and planning and on street area landscaping.
- The Parks and Water Bureaus have agreed to a development plan for a new 570 acre regional park at Powell Butte at SE 158th between Powell Blvd. and Foster Road. A \$160,000 grant for first phase development of the park has been awarded to the City by the Federal government. The City is expecting a Phase II development grant in the amount of \$150,000.

TRANSPORTATION

- The County has transferred 359 miles of roads to the City. Forty-eight County transportation positions have been transferred to the City.
- The City has received approximately \$19.6 million dollars in County road revenues in Fiscal Years 1984-85 through 1987-88. It is estimated that another \$3.3 million in additional direct-share state gas taxes has been received as a result of annexation.
- The City has provided approximately \$20.3 million in transportation services to annexed areas in Fiscal Years 1984-85 through 1987-88.
- Between November 1983, and July 1986, City street miles increased by 29%, the number of bridges and tunnels under City jurisdiction increased by 70%, and the number of traffic signals increased by 11%.
- The City has provided traffic management, transportation planning, engineering, street maintenance and street cleaning in the area.
- The \$15 million Airport Way project, now well on its way toward construction, will provide the impetus for development of the 1,000 acre Columbia South Shore Industrial District that was annexed in November 1983.

ENVIRONMENTAL SERVICES

- The Cities of Portland and Gresham in 1984 secured \$14 million in Federal grants to provide treatment capacity and trunk sewers to the mid-County area, thereby reducing the cost of the Implementation Plan to mid-County residents and businesses.
- Grant funds and City money were invested in a pump station alternative that avoided immediate construction of a new treatment plant and was available for use much sooner than the treatment plan alternative. It is estimated that pumping sewage to the City's treatment plant instead of building a new plant will save rate payers over \$30 million in the next 20 years.
- Portland and Gresham have been granted an additional \$14 million from the \$27 million that Oregon received from the Clean Water Act recently passed by Congress. The City will continue to seek ways to reduce the cost of building sewers in mid-County, such as the recent hiring of a representative in Washington, D.C. to pursue sewer funding opportunities.
- A mid-County Customer Service Office was opened in 1986.
- The Bureau of Environmental Services 1986-87 budget includes \$365,000 for installation of sumps, storm sewer system reviews, and storm sewer extensions in the mid-County area. These are expenditures that are not required by the Sewer Implementation Plan. An additional \$365,000 was allocated for annexed areas in the 87-88 budget, plus \$124,000 for anticipated annexed areas.
- The Bureau has completed several successful sanitary LID's in mid-County. Actual project costs have been 15-20% less than engineering estimates.

- A safety net proposal has been completed. It is designed to prevent anyone from being forced from their home because of sewer costs. Depending on household income and expenses, it will allow qualified households to defer 20% to 100% of sewer costs and/or the physical connection to the sewer system. Safety net deferrals have been occurring since the end of 1987.
- The City successfully lobbied the legislature on several House and Senate Bills that will make sewers more affordable in mid-County including State funding for the Safety Net.

WATER SERVICE

- Three water districts (Rose City, Parkrose and Darlington) have been dissolved and their employees, assets and liabilities transferred to the City.
- The Water Bureau has concluded agreements with two additional water districts (Powell Valley and Sylvan) on annexation, withdrawal and dissolution of the districts. Discussions are in progress for similar agreements with the Rockwood and Gilbert Water Districts. Sylvan's assets and service responsibility will be transferred to Portland since a successful dissolution election on March 22, 1988 showed 95% of the voters elected to dissolve the district.
- Negotiations are under way for the purchase of two water companies; Community and Jantzen Beach. Portland residents on Hayden Island are already receiving lower City water and sewer rates, even though the City has not yet acquired the system.
- Eighty-three percent of the Hazelwood Water District (the part within the City) will be withdrawn on July 1, 1988.
- Water rates have been reduced by up to 40% for those customers who have annexed to the City of Portland.
- Over \$1 million in water system improvements have been made that provide service to annexed areas. Improvements anticipated in the future will total over \$40 million. These include:

Completed

Portland Highway (Rose City) Supply Main	\$ 810,000
Parkrose Supply Main (design)	36,000
Powell Valley Interties	15,000
Mapping	9,500
Columbia South Shore Supply	27,000
Hayden Island Supply	<u>196,000</u>
	\$ 1,093,500

Anticipated

Powell Butte Reservoirs No. 2 and No. 3	\$22,900,000
Halsey Supply Loop	5,000,000
Parkrose Supply Main (construction)	3,689,000
Columbia South Shore Supply	2,827,000
East Boundary Main	1,215,000
Kelly Butte Tank Outlet	759,000
PIA East Supply Main	435,000
Stark Street Main Phase I	329,000
Klickitat Reservoir Supply Main	<u>270,000</u>
	\$37,424,000

Anticipated Neighborhood-Specific Improvements

Clifgate Main Improvements	\$ 175,000
Clifgate Fire Hydrants	20,000
Gateway Main Improvements	580,000
Gateway Fire Hydrants	60,000
Cherry Park Main Improvements	375,000
Cherry Park Fire Hydrants	40,000
Old Parkrose Main Improvements	200,000
Old Parkrose Fire Hydrants	20,000
Parkrose Heights Main Improvements	550,000
Parkrose Heights Fire Hydrants	60,000
West Powellhurst Main Improvements	380,000
West Powellhurst Fire Hydrants	40,000
Wilkes Main Improvements	200,000
Wilkes Fire Hydrants	<u>20,000</u>
	\$2,720,000

- Many of the above improvements provide or improve service to areas that were in the City prior to 1983. However, all of them will be of substantial benefit to the recently annexed areas.

CODE ENFORCEMENT AND NUISANCE ABATEMENT

- Multnomah County Permits Division consolidated with the Portland Bureau of Buildings in July 1986.
- Housing and nuisance codes that have received little or no enforcement in unincorporated areas have begun to be enforced. The City has enforced the housing code, abated dangerous buildings, inspected adult care homes, abated nuisances, towed abandoned vehicles and taken violators to the City Code Enforcement Hearings Office.
- The City has enforced its regulatory code in annexed areas, resulting in the reduction of illegal activities such as "video poker" and illegal bingo operations.
- * Urban Services Surveys show a high demand for nuisance abatement services.

PLANNING AND ZONING

- The City has amended its Comprehensive Plan and created three new zones so that the Community Plans can be faithfully implemented by the City. Several areas have received special Plan District designations that implement unusual provisions contained in the Community Plans.
- Portland is spending about \$150,000 per year on neighborhood planning, zone change requests, conditional use applications, and development requests in the annexed areas are costing the City about \$120,000 per year in staff time.
- Portland and the Powell Valley Water District are cooperatively upsizing a water main outside the City at a cost to Portland of \$24,000.

ECONOMIC DEVELOPMENT

- The Columbia South Shore Urban Renewal Project will open up over 1,000 acres of serviced industrial land for development. Over 6,000 new jobs are projected by 2005. The district has the potential for eventually accommodating 20,000 jobs. Project service improvements include:

• Transportation (including Airport Way)	\$33.2 million
• Stormwater Drainage	11.3 million
• Recreation and Open Space	9.7 million
• Water Supply	2.8 million
• Sanitary Sewers	.NA

NEIGHBORHOOD SERVICES

- With the formal recognition of the Hazelwood Community Group scheduled for March 17, 1988, there will be nine recognized neighborhood associations in the East Portland territory: Argay Terrace Neighborhood Association (ANA), Cully Association of Neighbors (CAN), Hazelwood Community Group (HCG), Mill Park Neighborhood Association (MPNA), Parkrose Community Group (PCG), Parkrose Heights Association of Neighbors (PHAN), Parkrose Neighborhood Association (PNA), Powellhurst/Gilbert Neighborhood Association (P/GNA), and Woodland Park Neighborhood Association. We are looking forward to welcoming the Wilkes Community Group into our neighborhood network in the next month.
- During the past six months, neighborhood activists and staff from Urban Service and ONA have worked hard to develop an accord that promotes maximum citizen participation and cooperation between the pre-existing community groups and the recently established neighborhood associations. Representatives from each of these organizations are now meeting bi-monthly to discuss community issues, City projects and to share the comraderie of other citizen activists.
- Several hundred calls per month from citizens with concerns and requests, ranging from nuisance and noise control to assistance with land use, crime prevention and fund raising are responded to by ONA.
- ONA has provided technical and financial support to residents throughout mid-County such as daily information and referral services, newsletter printing and mailing, resolution of nuisance issues, crime prevention training, liaison with school districts, and neighborhood fund raisers.
- The Neighborhood Handbook was developed as a tool for new neighborhoods to access City service systems.
- Hayden Island--urban services workshops and surveys are in process for this spring. The goal of the Urban Services Division and ONA is an active neighborhood association on the island in 1988.
- Workshops have and are being held to educate Portland's newest citizens on how to have their service needs met through the use of the Neighborhood Needs and Budget Advisory Committee processes.
- **Neighborhood Plans/Community Plans Adopted or in Progress:**
 - Cully/Parkrose
 - Hazelwood Plan
 - Wilkes Community and Rockwood Corridor
 - Brentwood/Darlington
- **Zoning Completed:**
 - Parkrose I & II
 - Cully
 - Wilkes
 - Rockwood
 - Hazelwood (3/4ths complete)

CABLE COMMUNICATIONS

- Portland and Multnomah County Offices of Cable Communications worked together to establish a consistent body of guidelines to determine the transition of responsibilities from the County to the City resulting in Intergovernmental Agreement #22673, effective November 25, 1985.
- Since the beginning of 1986, the City has been responsible for collection and distribution of franchise fees from annexed areas to both the City and the County.
- The City Cable Office hired an additional staff person in FY 1986-87 to provide service to annexed areas.

SAVINGS FROM CITY ANNEXATIONS
(JANUARY 1985-JUNE 1987)

12/09/86

	1984-85	1985-86	1986-87	ANNUALIZED	
SAVINGS					
DEPUTY TRANSFER	1,600,000	1,200,000	330,000-	2,800,000	
PLANNING TRANSFER	200,000			200,000	
TRANSFER OF ROADS	2,445,000	1,026,000	2,645,000	6,116,000	
TRANSFER PERMITS			987,000	987,000	
SUBTOTAL SAVINGS	4,245,000	2,226,000	3,302,000	10,103,000	
REVENUES					
HAYDEN ISLAND	400,000	400,000	125,000		HOTEL/MOTEL TAX (ANNEXATION DELAYED)
ANIMAL CONTROL	300,000				ONE-TIME SUBSIDY
PERMITS REVENUE TRANSFERRED			877,000-	877,000-	
SUBTOTAL REVENUES	700,000	400,000	752,000-	877,000-	
TOTAL BENEFIT	4,945,000	2,626,000	2,550,000	9,226,000	

ADDITIONAL COSTS AND PROGRAMS FUNDED					

DA DRUNK DRIVING PROSECUTION	182,000			189,000	
DA DUII ALTERNATIVE SVCS	50,000			52,000	
DA / DUII		84,000		84,000	
DA DOMESTIC VIOLENCE		117,000		117,000	
DES 40 MILE LOOP	30,000				ONE-TIME COST
DES EXPO MGMT AND MTCE	92,000			96,000	
DES ANIMAL CONTROL	300,000	246,000		546,000	
DES PERMITS CONTRACT			172,000	172,000	
DHS CLINIC FED REVENUE REPL	650,000			676,000	
DHS MENTAL/EMOTIONAL DEV		130,000		130,000	
DHS PUB GUARD. ALC/DRUG		81,000		81,000	
DHS TEEN HEALTH CLINIC		52,000		52,000	
DHS CLINIC SVCS		180,000		180,000	
DHS CHRONIC DISEASE PREV		122,000		122,000	
DHS ALC/DRUG CRISIS		115,000		115,000	
DHS YOUTH ALCOHOL		250,000		250,000	
DHS PRE-NATAL/MAT SVS		300,000		300,000	
GAS TAX TRANSFER	2,445,000	1,026,000	2,645,000	6,116,000	
SUBTOTAL COSTS AND PROGRAMS	3,749,000	2,703,000	2,817,000	9,278,000	



CITY OF
PORTLAND, OREGON
OFFICE OF CITY ATTORNEY

MAR 23 1988

Jeffrey L. Rogers, City Attorney
1220 S.W. 5th Avenue
Portland, Oregon 97204
(503) 248-4047

March 23, 1988

INTEROFFICE MEMORANDUM

TO: Susan McPherson
Office of Fiscal Administration, B106/R1250

FROM: Jeffrey L. Rogers *JLR*

SUBJ: Summary of litigation concerning legislative
annexations and double majority

As we discussed, here is a page to add to the four-page summary that Adrienne and Kathryn previously sent you. They summarized litigation relating to:

1. The proposed city of Columbia Ridge and
2. Triple majority annexations.

The attached page brings the litigation up to date by summarizing matters related to:

3. Legislative annexations
4. Double majority annexation.

JLR/dzl:9A
Att.

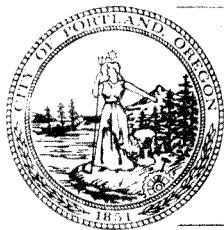
Legislative Annexations

In light of the uncertainty created by the Court of Appeals' ruling on triple majority annexations, the 1987 Oregon Legislature passed a bill creating legislative annexations. Senate Bill 556 (Oregon Laws 1987, Ch. 818) became effective July 18, 1987 and legislatively annexed all territories described in boundary commission orders of annexation which became effective between January 1, 1985 and July 18, 1987.

In November, 1987, Mid-County Future Alternatives Committee and Peter M. Smith filed a complaint in Multnomah County Circuit Court alleging that the legislative annexations created by Senate Bill 556 are unconstitutional. The defendants named in the lawsuit are the cities of Portland and Gresham, the Portland Metropolitan Area Local Boundary Commission, Multnomah County, and the State of Oregon. All parties to the lawsuit filed motions for summary judgment, which were argued before Pro Tem Circuit Court Judge Katherine O'Neil on March 11, 1988. The court has not yet issued an opinion.

Double Majority Annexation

The 1987 Legislature also created a new method of annexation, sometimes referred to as "double majority annexation," ORS 199.490(2)(a)(B). This method allows an annexation to be initiated by a resolution adopted by a city or district after receiving written consent to annexation from a majority of electors registered in the territory proposed to be annexed, and written consent to the annexation of their land from the owners of more than half the land in the territory proposed to be annexed. In February of 1988, Mid-County Future Alternatives Committee, Peter M. Smith, and Dorothy Smith filed in the Oregon Court of Appeals a petition for judicial review of an order entered by the Portland Boundary Commission which annexed territory to the City of Gresham by the double majority method. Although plaintiffs have not specified their arguments, it is anticipated that they will assert the double majority annexation is unconstitutional. The schedule for briefs and oral argument has not yet been set.



CITY OF
PORTLAND, OREGON

OFFICE OF CITY ATTORNEY

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1220 S.W. 5th Avenue
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(503) 248-4047

March 16, 1988

INTEROFFICE MEMORANDUM

TO: Susan McPherson
Office of Fiscal Administration, B106/R1250

FROM: Kathryn Beaumont Imperati *KBI*
Chief Deputy City Attorney

Adrianne Brockman *AB*
Deputy City Attorney

SUBJ: Summary of cases involving new city of
Columbia Ridge and Triple Majority Annexation
Statute

Jeff Rogers asked that we forward to you summaries of the lawsuits generated by the Columbia Ridge proposal and involving the triple majority annexation statute. Our summaries are attached for your review. Please let us know if you have any questions or need additional information.

KBI/dzl:10
Att.

c: Jeff Rogers

Proposal to Create New City of Columbia Ridge

The Mid-County Future Alternatives Committee (MCFAC) petitioned the Boundary Commission to create a new city called Columbia Ridge by consolidating the City of Fairview with East Multnomah County. The Boundary Commission denied the consolidation petition on December 8, 1983. This "new city" proposal generated nine separate groups of lawsuits.

The first lawsuit, Mid-County Future Alternative Committee v. Portland Metropolitan Area Local Government Boundary Commission (MCFAC I), was a proceeding before the Court of Appeals to review the Boundary Commission's order denying the Columbia Ridge consolidation petition. On February 27, 1985, the Court of Appeals vacated the Boundary Commission's order and held the consolidation petition was deemed approved because the Boundary Commission failed to file a certified copy of its final order with the City of Fairview within the 120-day period prescribed by statute. The Oregon Supreme Court accepted review of the case on July 23, 1985. On September 17, 1985 the Supreme Court issued an opinion overturning the Court of Appeals. The Court ruled that the consolidation petition was void because the applicable statutes required the participation of at least two cities to form a consolidated city, and the Columbia Ridge proposal involved only one city, the City of Fairview. The Court remanded the case to the Boundary Commission to vacate its proceedings on the Columbia Ridge petition and to return the petition to the City of Fairview. The Oregon Supreme Court denied MCFAC's petition for reconsideration on October 22, 1985.

The second case, City of Fairview v. Portland Metropolitan Area Local Government Boundary Commission, was a proceeding for declaratory judgment and injunctive relief filed in Multnomah County Circuit Court. The City of Fairview asked the Court to enjoin the Boundary Commission from considering any future annexation proposals that involved territory within the purported boundaries of the City of Columbia Ridge. On January 18, 1984 the Circuit Court entered a judgment dismissing this case. The Court ruled that the City of Fairview was essentially seeking review of the Boundary Commission's decision on the Columbia Ridge petition and that the Court of Appeals, not the Circuit Court, had exclusive jurisdiction to review Boundary Commission decisions. Fairview appealed the Circuit Court's ruling to the Court of Appeals and on March 6, 1985 the Court of Appeals affirmed the Circuit Court.

The third group of cases, City of Gresham v. Portland Metropolitan Area Local Government Boundary Commission and City of Portland v. Portland Metropolitan Area Local

Government Boundary Commission, were proceedings before the Court of Appeals to review the order approving the Columbia Ridge petition created by the Court of Appeals' February 27, 1985 decision in MCFAC I. On November 18, 1985, the Court of Appeals dismissed both appeals as moot.

The fourth group of cases were proceedings for declaratory and injunctive relief filed in Multnomah County Circuit Court by the Cities of Portland and Gresham. (City of Portland v. City of Fairview, City of Gresham v. City of Fairview) Both cities asked the Circuit Court to enjoin Fairview from accepting the proposed charter prepared by the Fairview/Columbia Ridge Charter Commission, adopting a ballot title, and filing the ballot title with the Multnomah County Clerk. This request was based on the fact that the proposed charter contained a legal description of Columbia Ridge that differed from the legal description in the original consolidation petition and that purported to include territory annexed to Portland and Gresham. On July 30, 1985, the Circuit Court entered an order permanently enjoining Fairview from changing the boundaries of Columbia Ridge as described in the original consolidation petition. On February 19, 1986, at the request of Portland and Gresham, the Circuit Court entered a judgment dismissing both lawsuits as moot.

The fifth case, Mid-County Future Alternatives Committee v. Portland Metropolitan Area Local Government Boundary Commission (MCFAC II), was a proceeding for declaratory and injunctive relief filed in Multnomah County Circuit Court. MCFAC asked the Circuit Court to invalidate all annexations to Portland and Gresham approved by the Boundary Commission after August 18, 1983 (the date the Boundary Commission received the Columbia Ridge consolidation petition) and to enjoin the cities and the Boundary Commission from processing and approving additional annexations pending a vote on Columbia Ridge. On June 27, 1985, the Circuit Court entered an order dismissing this lawsuit for lack of jurisdiction. MCFAC appealed the Circuit Court's ruling to the Court of Appeals and on December 30, 1985 the Court of Appeals dismissed the appeal because MCFAC failed to timely file and serve a brief.

The sixth case, Rick Frank Sekne dba The Graffice Tavern v. Portland Metropolitan Area Local Government Boundary Commission, was a proceeding before the Court of Appeals to review one annexation to Portland approved by the Boundary Commission in March, 1985. The parties agreed to hold the

case in abeyance pending the Supreme Court's disposition of MCFAC I. On October 29, 1985, the Supreme Court dismissed the case at the request of all parties.

The seventh case, Peter Smith v. Vicki Ervin and Barbara Roberts, was an appeal to the Multnomah County Circuit Court to review a temporary administrative rule adopted by the Secretary of State which directed the Multnomah County Clerk to modify the map and boundaries of Columbia Ridge to exclude all territory annexed to Portland and Gresham as of August 21, 1985. At the request of Vicki Ervin (Multnomah County) and Barbara Roberts (State of Oregon), the Multnomah County Circuit Court transferred the case to Marion County Circuit Court on September 3, 1985. On October 11, 1985 the Marion County Circuit Court entered a judgment dismissing the case.

The eighth group of cases, Mid-County Future Alternatives Committee v. Portland Metropolitan Area Local Government Boundary Commission and City of Portland (MCFAC III), were proceedings before the Court of Appeals to review four triple majority annexations to Portland approved by the Boundary Commission in March, 1985. These are the group of cases in which the Court of Appeals ultimately ruled that the triple majority statute was unconstitutional and are summarized below.

The final group of cases, Mid-County Future Alternatives Committee v. Portland Metropolitan Area Local Government Boundary Commission and City of Portland (3 cases) and Mid-County Future Alternatives Committee v. Portland Metropolitan Area Local Government Boundary Commission and City of Gresham (1 case), were proceedings before the Court of Appeals to review four annexations to Portland and Gresham approved by the Boundary Commission in June, 1985. These are four of the 56 additional annexations that MCFAC appealed to the Court of Appeals beginning in August, 1985 and are summarized below.

Triple Majority Annexations

Four annexations to the City of Portland using the triple majority annexation provisions, ORS 199.490(2)(a)(A), were approved by the Portland Metropolitan Area Local Government Boundary Commission and became effective in March 1985. These annexations were appealed by the Mid-County Future Alternatives Committee to the Court of Appeals. The appealed annexations were consolidated into one case. The case was argued before the Court of Appeals in May 1986. In November 1986, the Court held the triple majority statute to be unconstitutional. Mid-County Future Alternatives Committee v. Portland Metropolitan Area Local Government Boundary Commission, 82 Or App 193, 728 P2d 63 (1986). The City and other respondents petitioned the Court for reconsideration in December 1986. The Court reconsidered the matter and in February 1987 modified its decision, but maintained its holding that the statute is unconstitutional. (83 Or App 552, 733 P2d 451 (1987)) An appeal was taken to the Oregon Supreme Court and the Court allowed review in April 1987. Subsequently, the Legislature annexed the areas subject to the appeal to the City of Portland by enactment of a statute. The Supreme Court dismissed the appeals as being moot in September 1987 (304 Or 89, ___ P2d ___ (1987)).

The Mid-County Future Alternative Committee beginning in August 1985 appealed 56 additional annexations. These annexations are before the Court of Appeals, however any action on these cases was held in abeyance until the Supreme Court decided whether the triple majority statute is constitutional. The Supreme Court's action in dismissing the appeal leaves the Court of Appeals' decision as the current law. At the present time, the petitioners' attorney and the Boundary Commission's attorney are working out an agreement to consolidate certain of these pending cases. The records are due March 11, 1988. Some of these cases raise some additional issues and therefore, there may be argument before the Court of Appeals. These areas, however, were also annexed to the City by the legislation enacted by the Legislature. Therefore, some of the appeals may be moot.

There is one other triple majority case, Sylvan Water District v. Portland Metropolitan Area Local Government Boundary Commission, which is being held in abeyance. At present there is no action on this case.

AB/dzl:9

**METHODS OF ANNEXATION:
SUMMARY OF EXISTING LAW**

In Boundary Commission Areas (ORS 199):	Prior Consent Required?	Election Option?
1. By resolution of the governing body of the affected city or district [ORS 199.490 (1)(a)]	No	Yes, by Remonstrance
2. By petition signed by 10 percent of the electors registered in the affected territory [ORS 199.490(1)(b)]	Yes	Yes, by Remonstrance
3. By petition signed by the owners of at least one-half the land area in the affected territory [ORS 199.490(1)(c)]	Yes	Yes, by Remonstrance
4. By resolution of a boundary commission having jurisdiction of the affected territory [ORS 199.490(1)(d)]	No	Yes, by Remonstrance
5. By a resolution adopted by the governing body or district upon receiving consent to annex their land in writing from more than half of the owners of land in the territory proposed to be annexed, who also own more than half of the land in the territory proposed to be annexed and of real property therein representing more than half of the assessed value of all real property in the territory proposed to be annexed. ("Triple majority") [ORS 199.490(2)(a)]	Yes	No
6. As provided by ORS 222.750: When territory not within a city is surrounded by the corporate boundaries of the city, or by the corporate boundaries of the city and the ocean shore or a stream, bay, lake or other body of water, except when the territory not within a city is surrounded entirely by water. ("Island annexation") [ORS 199.487(1)]	No	No
7. As provided by ORS 222.840 to 222.915: (Health hazard abatement) [ORS 199.487(1)]; also referenced as (By) findings adopted by the Assistant Director for Health under ORS 222.880 [ORS 199.490(5)(b)]	No	No
8. By petition signed by owners of one half the land area of the territory intended to be annexed, in addition to a petition signed by one half of the registered voters in the intended area. ("Double Majority") [ORS 199.490(2)]	Yes	No

In Non-Boundary Commission Areas (ORS 222): Required?	Prior Consent Option?	Election
1. By the legislative body of the city, on its own motion [ORS 222.111(2)]	No	Council option prior to action; Subject to referendum
2. By a petition to the legislative body of the city by owners of real property in the territory to be annexed. [ORS 222.111(2)]	Yes	No
a. by written consent to annexation by all the owners of land in the territory. [ORS 222.125]	Yes	Council option prior to action; subject to remonstrance
b. by written consent to annex of more than half of the owners of land in the territory who also own more than half of the land in the territory and of real property therein representing more than half of the assessed value of all real property in the territory. [ORS 222.170]	No	No
3. When territory not within a city is surrounded by the corporate boundaries of the city, or by the corporate boundaries of the city and the ocean shore or a stream, bay, lake or other body of water, except when the territory not within a city is surrounded entirely by water. ("Island annexation") [ORS 222.750]	No	No
4. When it is found that a danger to public health exists because of conditions within the territory and that such conditions can be removed or alleviated by sanitary, water or other facilities ordinarily provided by incorporated cities. (Health hazard abatement) [ORS 222.855]	No	No

JWC:
1/7/87

APPENDIX 10

	What are the goals to accomplish the Urban Service policy goals? There are 3 program options available Aggressive, Medium Pro-Active, and Passive		
	AGGRESSIVE PROGRAM	MEDIUM-PROACTIVE PROGRAM	PASSIVE PROGRAM
ASSUMPTIONS	*MAXIMUM ALL-OUT EFFORT BY CITY/COUNTY *HIGH VISIBILITY / COOPERATION	*STEADY MEASURED APPROACH *COOPERATION BETWEEN CITY/COUNTY	*ANNEX TO US BOUNDARY AS NOW SET/NO TIME LINE FOR ACCOMPLISHING
TIME FRAME	*1-2 YEARS(APPROXIMATELY 20,000 PER YEAR) Maintain road agreement	*4-6 YEARS±(APPROX 10,000 PEOPLE PER YEAR)	*15 YEARS±(2-3000 PEOPLE PER YEAR)
SERVICE / POLICY CITY & COUNTY	*LOOK AT WHAT IS BEST FOR CITY/MULT CO. AS A WHOLE *POLICY COMMITMENTS FROM COMM. TO THEIR BUREAUS	*MORE ATTRACTIVE TO BE INSIDE THAN OUT Maintain road agreement *TIE SERVICE DELIVERY TO BUDGET PROCESS	*MAINTAIN ROAD AGREEMENT *REDUCE NEIGHBORHOOD LEVEL SERVICE
STAFFING	*FY 86-87 LEVELS OF STAFFING FROM BOTH CITY AND COUNTY INCLUDING CAT TEAM BUDGET 10 ANNEXATION STAFF 3 URBAN SERVICES STAFF CITY COSTS - \$750,000 (1987 LEVELS) COUNTY COSTS - \$100,000 (1987 LEVELS)	*STAFFING AS REVISED PROPOSAL-BOTH CITY AND COUNTY 4 ANNEXATION STAFF 2 URBAN SERVICES STAFF CITY COSTS - \$335,000 (PROPOSED 1988 LEVEL) COUNTY COSTS - \$150,000 (PROPOSED 1988 LEVEL) TOTAL PROGRAM COST \$485,000	*MINIMAL PERSONNEL FOR PROCESSING *MOVE ANNEXATION STAFF BACK TO PLANNING 3 ANNEXATION STAFF (1981 LEVEL) APPROX. CITY COSTS - \$139,000 APPROX COUNTY COSTS - \$0
FUNDING	*CITY & COUNTY BOTH CONTRIBUTE *ADVERTISING FIRM/PRESS RELATIONS/MEDIA	*FUNDING AT REVISED PROPOSAL LEVEL-CITY AND COUNTY BOTH CONTRIBUTE	*CITY PAYS ALL LACK OF COUNTY PARTICIPATION SUBSTANTIAL REDUCTION OF FUNDING
CITIZEN INVOLVEMENT	*CREATE FORUMS-HI KEY-HIGH VISIBILITY *STRONG DOOR TO DOOR CITIZEN GROUP HEAVY RELIANCE ON CAT TEAM	*STRONG EMPHASIS ON CITIZEN INVOLVEMENT ON CONTINUAL BASIS *CONTINUED CAT TEAM BUT IN SUPPORT OF CITIZEN EFFORTS	
POLITICAL ARENA	*HIGH LEVEL PARTICIPATION FROM ALL POLITICAL LEADERS/ STATE & LOCAL REPRESENTATIVES *LOBBYIST FOR LEGISLATIVE PACKAGE WHICH PUTS EMPHASIS OF ANNEXATION LEGISLATION	*REGULAR FOCUSED CITY-COUNTY COMMISSIONER MEETINGS *STAFF ABSORBS LEGISLATIVE ACTIVITY, ESPECIALLY URBAN SERVICES MANAGER	*STRICTLY CITIZEN DRIVEN
METHOD	*STRATEGIC IMPLEMENTATION OF ALL LEGISLATIVE METHODS	ADD DOUBLE MAJORITY TO EXISTING METHODS	*WHATEVER METHOD APPLICANT SELECTS

SECTION IV: CONCLUSION AND RECOMMENDATIONS

The Urban Services Policy and Annexation Program have important implications for the future of Portland. On the large scale, a Pacific Rim economy is emerging which promises to dominate in the next century. The size and strength Portland attains in the near term sets the stage for our stature in that important arena. Closer to home, major rearrangement of local government resources has taken place due to the annexation of some 55,000 people and \$1.86 billion worth of real estate to Portland during the past four years.

When the program began in 1983 the population of Portland was 365,000, but by December, 1987 the City had officially grown by 55,144, to 420,144. When annexations to Portland are completed in Multnomah County, the City population will be approximately 467,000, which is about the posted size of Seattle.

Several other cities in the metropolitan region have or are in the process of developing their own urban service policies and boundaries. Portland has developed such a boundary agreement with Clackamas County, to the south, and is now negotiating such an agreement with Washington County to the west. The figures provided included data for Multnomah County only, and are not based upon possible annexations to the south and west.

The adoption of these policies by the City and County Commissioners culminated a decade of study, debate, and earlier attempts at finding a solution to the urban subsidy. Portland and Multnomah County led the way in adopting and implementing these policies to better serve their respective, often overlapping, constituencies equitably.

The specific goal is successful implementation of the USP and Resolution "A" using an intensive citizen participation process as the impetus for action. The means is annexation of developed, unincorporated Multnomah County neighborhoods within Portland's Urban Service Boundary. The objectives of this program are:

- to eliminate the urban subsidy in Multnomah County;
- to provide City and County services economically and efficiently, with minimal duplication;
- to develop a cooperative spirit involving various interests and citizens;
- to increase economic development opportunities and provide infrastructure to undeveloped tracts near the Columbia River and Portland International Airport;
- to increase Portland's political, economic, and social standing in the region;
- to increase the City's fiscal base while maintaining its AAA municipal bond rating;
- to increase the City population by more than 25%, to nearly 500,000; and
- to nurture a strong, growing Central City.

At this point it appears that Multnomah County has reaped more direct benefit from the policy and program than has the City. Their financial problems have been reversed as their municipal service delivery area has been reduced. City residents are now getting better service from the County for their County tax dollars.

Portland, on the other hand, is faced with increased service demands citywide plus an increased service area. Although a strict financial analysis of the program indicates a negative revenue flow for the City in the short term, the broader benefits of the program outweigh that factor. The program has captured national attention as one of 90 jurisdictions selected from a field of some 970 pre-applications accepted into an awards competition recognizing innovations in local government, sponsored by the Ford Foundation and the JFK School of Government at Harvard University.

The Economic Development Advisory Committee, established in 1980 to produce an economic development policy for Portland, was reconvened in 1987. Among their findings in a February, 1988 report to City Council was the following:

"The annexation program appears to present another opportunity for better coordination. The region's business and government leaders have identified annexation as critical to the region's long-range economic prosperity(emphasis added). After four years of dramatic results--nearly 70,000 new residents in Portland and Gresham--court decisions have muddled future annexations. A renewed commitment and increased cooperation between City and County officials is needed to keep the program on track."

The report went on to propose a 1988 Economic Development Policy Update, which includes policy statements in various categories. Goal D under Coordination reads as follows:

D. To coordinate with counties, cities and special service districts in the region to ensure that the annexation and urban services program is completed expeditiously.

A model aspect of the program is the high level of cooperation between City and County. By coming to similar conclusions and adopting analogous policies, Portland and Multnomah County broke new ground for local intergovernmental cooperation and the coordination achieved in this process is a departure from past relations. But, because of the change, Portland is expanding its municipal service area by one-quarter, and Multnomah County has actually restructured its service responsibilities to deal with the pressing countywide issues of criminal incarceration and human services. The political obstacles associated with this program are an ongoing part of the process. The range of issues runs from potential for change in the political leadership, to jurisdictional "turf" disputes, to organized opposition.

It is helpful to consider the USP and Annexation Program by looking at them from different perspectives. Historically, the pattern of growth and annexation exhibited by the advent of the USP echoes earlier times of growth in Portland, and it is similar to that of other urban areas. Today a number of Oregon cities, counties, and special districts are

working on this issue, developing policies and implementation techniques modeled on the Portland/Multnomah County experience. Geographically, the activity occurring now will shape Portland's stature as a major West Coast city and Pacific Rim port into the 21st century. Financially, most indicators show more net benefit than loss in the long term with completion of the annexation program. Politically, the Urban Services Policy is valid today for all the same reasons it was valid when adopted in 1983. The end result will be a stronger City, a more effective County, and a well-served constituency.

Staff Recommendations

Based on the stated objectives of the program and the conclusions summarized herein, staff makes the following recommendations:

1. Ratification of the Urban Services Policy by the City Council.
2. Continuation of the Annexation Program in Multnomah County.
3. Support a moderate, and measured, pace of annexation designed to complete the program in Multnomah County in about 5 years.
4. Flexibility in bringing annexations before Council by various statutory means, as individual cases warrant.
5. Actively solicit annexation support under the terms of the Double Majority Method.
6. Initiate annexations under the terms of the Island Method in special instances, such as real service deficiencies or a test of cost-effectiveness.
7. Except for special cases, the effective date for annexations should be the last day of each Fiscal Year.
8. Continue to monitor performance of the program through on-going fiscal analysis, and service planning for the targeted neighborhoods.
9. Maintain both the political and financial support of Multnomah County through the completion of the program.
10. Continue regional coordination and complete the process determining an Urban Services Boundary to the west, in Washington County.

ANNEXATION ISSUES/RECOMMENDATIONS

<u>ISSUE</u>	<u>RECOMMENDATION</u>
1. Continue or Not	Continue
2. Pace of annexations	Proposed schedule which annexes 47K thru 1993
3. Methods	Do not use triple majority in East Multnomah County. Add new double majority to list of methods.
4. Effective date	Continue June 30 effective date unless Council specifies otherwise on case-by-case basis
5. Fiscal analysis	Continue to develop improved cost estimates.
6. Rationalize service areas	Annex islands in order to reduce confusing service areas.
7. County Involvement	Seek continued strong role: <ul style="list-style-type: none">- political involvement- Continue Road Agreement- County funding for USP
8. Areas for activity	Unincorporated Multnomah Co. Washington Co. USB
9. Next step	Review by Council Resolution & hearing

March 29, 1988



CITY OF PORTLAND GENERAL INFORMATION	226-3161/796-6868/TDD
MULTNOMAH COUNTY GENERAL INFORMATION	248-3511
VISITORS INFORMATION CENTER	222-2223
TDD NUMBERS LISTED FOR HEARING IMPAIRED	

Police, Fire, Ambulance 911/760-2212/TDD

Northwest Natural Gas	226-4211
Portland General Electric	226-8111
Pacific Power & Light	238-2851
Street Lights	796-5197
Traffic Signals	248-5545

Sewers: Environmental Services, Weekdays	248-5546
Street Repairs: Transportation, Weekdays	248-5509
After Hours	248-5506
Water Bureau: 24 Hours	248-4874

Child Abuse	238-7555
Metro Crisis Intervention Referral (Mental Health, Shelter, Medical, 24 hours a day)	223-6161
Poison Control Center	225-8968
Portland Women's Crisis Line	235-5333
Sexual Minorities Counseling Hotline	228-6785

Child Abuse & Neglect Hotline 238-7555
United Way Information & Referral for Social Services 222-5555

Birth & Death Certificates	229-5710
Census & Population, PSU	229-3922
Metropolitan Service District (Metro)	221-1646
Chamber of Commerce	228-9411
Tri-Met	233-3511/238-5811/TDD



Employment Division: City (See Jobs)	
State	1-378-3146
Federal	221-3144
Metro	221-1646
District Attorney, Multnomah County	248-3162
Marriage Licenses	248-3027
Elections: Voting Registration/Poling Places (Multnomah County)	248-3720
Parade Permits: Mayor's Office	248-4739
Port of Portland	231-5000
Portland Public School District	249-2000
Road Conditions, State of Oregon Information	238-8400
State of Oregon Information	1-378-3131
TAXES, Multnomah County Information	248-3326
U.S. Postal Information	294-2300
Urban League	280-2600

ANIMALS & INSECTS & RODENTS

Adoption, Dog Licenses, Biting, Cruelty, Dead, Injured, Loose: Multnomah County Animal Control	667-7387
Animal excrement, Keeping of livestock & fowl or exotic pets: Health Sanitation	248-3400
Cat & Dog Licenses: Multnomah County	667-7387
Excessive Number of Animals: Bureau of Buildings	796-7306
Neutering Program: Multnomah County	667-7387
Rats: Rodent Control	289-6069
Mosquito Contro	289-6069

ANNEXATION

ANNEXATION OFFICE: How to Annex, Cost & Service Information	796-7714
URBAN SERVICES: General Service Questions Following Annexation	796-6861

AUTOMOBILES, BOATS, TRUCKS

Abandoned Autos: Neighborhood Division	796-7306
Blocking Driveway or Illegally Parked: Parking Patrol	796-5195
After Hours, Ask for "Non-Emergency"	911
Boat Registrations (Salem)	378-8587
Large Trucks Parked in Residential Areas: During Day: Neighborhood Division	796-7306
After Hours: Police Bureau	248-5688
Parking of Trailers, Campers & Boats	796-7306
Parking Violations: Multnomah County	248-3776

Towed Autos: Police Bureau	796-3044
Traffic Court: Multnomah County	248-3233

BUILDING SAFETY

INSPECTION DIVISION (for City areas & locations west of I-205 Freeway):

Building Information	796-7300
Permit Information	796-7310
Building, Electrical, Heating & Ventilation & Plumbing Inspection requests (After permit has been obtained)	796-7000

EAST INSPECTION DIVISION (East of I-205 Freeway to Gresham):

Building, Heating & Ventilation & Electrical Inspections	
Between 8 a.m. & 4:30 p.m. weekdays	248-3047
All other times	248-5272
Plumbing Inspections	248-3668
Septic Tanks & Cesspools (entire Multnomah County area)	248-3671

BUDGET

City Budget, Grants & Contract Compliance Information	796-5288
Budget, Multnomah County, Citizen Budget Advisory Committees	248-3450

BUSINESS LICENSES

License Information	796-5157
Liquor Licenses, Amusement Devices, Second-Hand dealers	796-5152
Social Games, Bingo	796-5160
Taxi Cab & Towing	796-5146
Transient Lodgings Tax (Hotels/Motels)	796-5157

CABLE COMMUNICATIONS

Cable Information	796-5385
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CITIZEN INVOLVEMENT

City of Portland General Information SEE NEIGHBORHOOD ASSOCIATIONS (page 10)	248-4519
Multnomah County Citizen Involvement Committee Office	248-3450



CITY MEETINGS, DOCUMENTS & REGULATIONS AUDITOR'S OFFICE

Archives	248-4631
Council Agendas	248-4086
Council Records	248-4082
Codes & City Charter (copies)	248-4084
Contracts	248-4022
City Elections (Call you County Elections Office for Voting Registration & Polling Places)	248-4087
Liens and Assessments	248-4090 or 4091
Local Improvement District Financing	248-4092
Additional Information	248-4078
Voters Registration (Multnomah County)	248-3720

CRIME PREVENTION & SECURITY

Portland Police Bureau	
General Information	796-3126/760-2212/TDD
Block Homes, Crime Prevention Unit	796-3137
Commercial Crime Prevention, Crime Prevention Unit	796-3134
Elderly Crime Prevention, Crime Prevention Unit	796-3133
Environmental Design	796-3138
Officer Friendly, Community Services	248-5719
Precinct Crime Prevention Officers:	
Central Precinct	796-3098
East Precinct	243-7355
North Precinct	248-5720
Residential Crime Prevention	796-3130
Residential Security Survey	796-3126
Sexual Assault Prevention, Crime Prevention Unit	796-3139
Statistical Analysis, Crime Prevention Unit	796-3141
Youth Sexual Assault Prevention	796-3132

Note: See Page 12 for Neighborhood Crime Prevention and Security telephone numbers.

CITY/SCHOOL LIAISON

Coordination	796-5290
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DEBRIS, OBSTRUCTIONS & REFUSE

Blocking Vision at Intersection: Traffic Management	796-5185
Blocking Street, Sidewalk, Alley: Neighborhood Division	796-7306

Appliances or Auto Storage in Yard	796-7306
Glass, Grass, Weeds, Vines, Obstructions of Sidewalks & Public Places	796-7306
Rodents in Garbage: Rodent Control	289-6069
Solid Waste Disposal Assistance	796-7010
Grass, Weeds, Trash, Debris, Overgrowth or obstruction of Sidewalks & Streets	796-7306
Vacant & Open Buildings	796-7306
Dangerous Buildings	796-7309

DISCRIMINATION & HUMAN RIGHTS

Human Relations	796-5136/760-2212/TDD
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ECONOMIC DEVELOPMENT

Portland Development Commission	796-5300
PDX Marketplace	243-7943

ELECTED OFFICIALS CITY OF PORTLAND

Mayor J. E. Bud Clark, Department of Finance & Administration	248-4120
Commissioner Dick Bogle, Department of Public Safety	248-4682
Commissioner Mike Lindberg, Department of Public Affairs	248-4145
Commissioner Earl Blumenauer, Department of Public Works	248-5577
Commissioner Bob Koch, Department of Public Utilities	248-4151
Barbara Clark, City Auditor	248-4078

FENCES, HEDGES & TREES

Fences & Hedges, Height Regulation, Encroaching on Public Property: Bureau of Buildings	796-7306
Tree Planting, Removal, Pruning Permits, & Related Tree Information: Park Forestry Division	248-4489

FIRE SAFETY

Fire Emergencies	911/760-2212/TDD
Fire Bureau Administration	248-0203
Faulty Wiring, Electrical Code Violations: Bureau of Buildings	796-7304
Fire Prevention & Hazards: Fire Bureau	248-0203
Information on Burning Days (Recording)	232-1383
Fire Marshal Information/Fire Code	248-0203
Fireworks	248-2677
Juvenile Firesetters Intervention Program	248-0203
Public Education, Fire	248-0203

GARBAGE

Killingsworth Fast Disposal (No Food Type Waste)	252-1487
Lack of Garbage Pickup (for apartments or single family)	796-7306
Landfill, St. Johns (All Waste) (Hours & Rates)	286-9613
Accumulating in Yards	796-7306
New Service or Problems with Garbage Pickup -- call your garbage service provider or the Haulers Union	231-2613
Haulers Association	282-0667
Recycling Information Switchboard	224-5555
SOLID WASTE (Garbage) Information	796-7010
Recycling Collection Information & Complaints	796-7202

HEALTH CONCERNS

Disease Control & Health Officer (Multnomah County)	248-3406
Health Information & Referral (Dental also)	248-3816
Hooper Center for Alcoholism Intervention	231-4066
Food Handlers Certificate	248-5257
T.B. Clinic	248-3417
Immunization Clinic	248-5140
Sexually Transmitted Disease Clinic	248-3700

HOUSING

Housing Rehabilitation Loans: Portland Development Commission	796-6800
Housing & Community Development	796-5166
Renter's Hotline (9 a.m.-noon)	299-5739
Subsidized Housing -- Housing Authority of Portland	249-5511
Subsidized Housing -- Section 8-HUD	221-3497
Homeless, Housing & Community Development	796-5166

INJURIES OR ACCIDENTS ON CITY PROPERTY

Risk Management	796-5101
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JOBS

Portland Job Training Agency (Private Industry Council)	241-4600
Job Information Recording (City)	248-4573

LEGISLATIVE

State & Congressional Information	248-4130
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MAPS

City Maps	796-7526
Zoning Maps	796-7526

NEIGHBORHOOD INFORMATION PROFILES

Neighborhood Information Profiles (Statistical Data)	796-6859
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NEIGHBORHOOD QUALITY

Nuisance, Abandoned Vehicles, Zoning Enforcement	796-7306
Home Occupation Permit	796-7306
Dangerous Buildings, Sub-standard Housing	796-7309

NOISE

Exceeding City Standards	796-7350
Barking Dogs: Multnomah County Animal Control	667-7387

PARADE & EVENT PERMITS

Parade, Running Events, Processions Through Streets, Coordination Major Festivals: Mayor's Office	248-4739
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PERMIT CENTER

BUREAU OF BUILDINGS:

Permit Center Information	796-7310
Microfilm Records, Document Control	796-7385
Plan Check Status, Fee Information	796-7357
Plumbing, Electrical, Heating & Ventilating Permits	796-7363
Street Use Permits	796-7385

***Residents in City Limits call above listings. Residents outside City Limits but west of 172nd, call the following listings:**

EAST PERMIT & INSPECTION DIVISION:

Permit Information:

Buildings/Heating & Ventilating	248-3047
Electrical	248-3047

Plumbing 248-3668
Septic Tanks & Cesspools 248-3671

BUREAU OF PLANNING:

Zoning, Variances, Conditional Uses 796-7526

TRANSPORTATION:

Driveways, House Moves, Sewer, Street Vending, Residential Parking . . 796-7002
Meter Hoods, Carpools, Parking 796-7365

FIRE MARSHAL:

Information, Fire Code Questions 796-7366

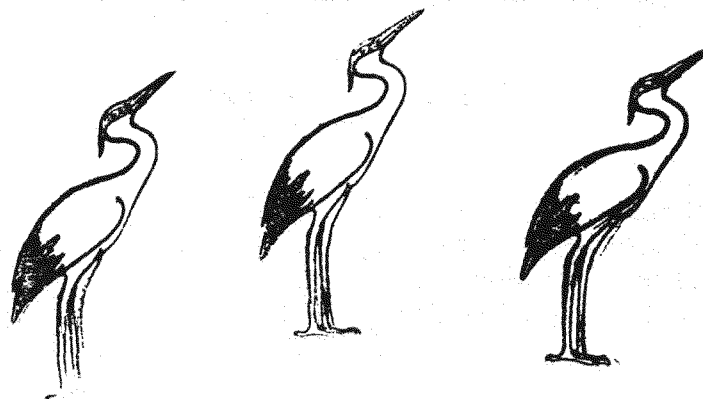
WATER BUREAU:

Water Permits (except Plumbing) 796-7368

PARKS:

Ball Field Permit 796-5155
Special Park Use & General Information 796-5193

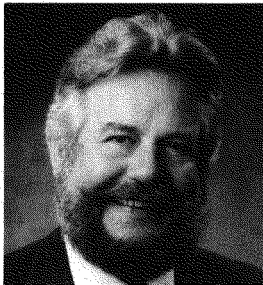
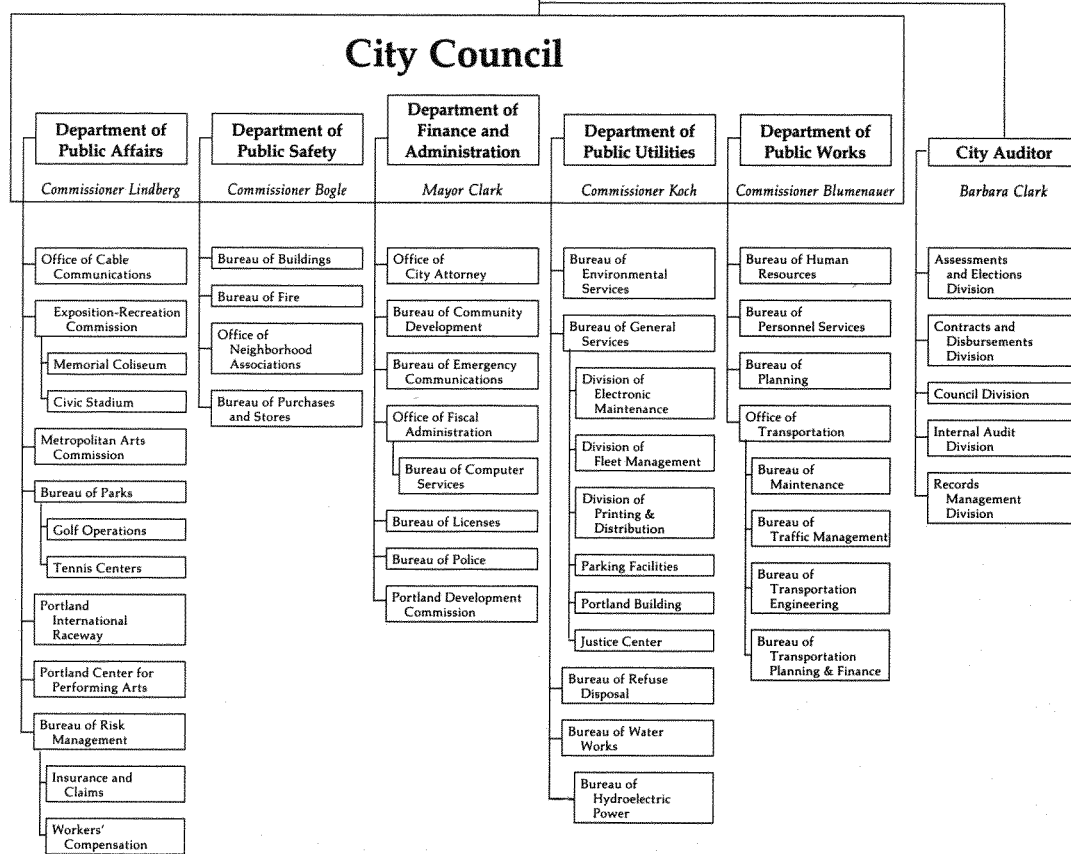
VENDOR PERMITS 796-7002





Organization of City Government

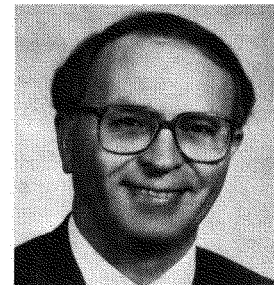
Citizens of the City of Portland



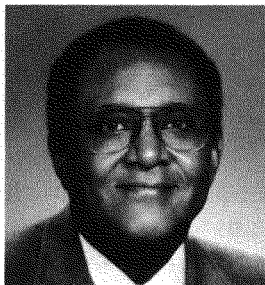
J. E. Bud Clark
Mayor



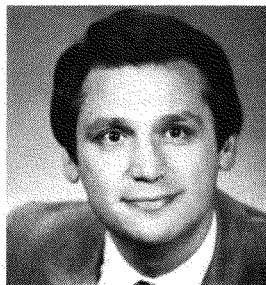
Bob Koch
Commissioner



Mike Lindberg
Commissioner



Dick Bogle
Commissioner



Earl Blumenauer
Commissioner



Barbara Clark
City Auditor

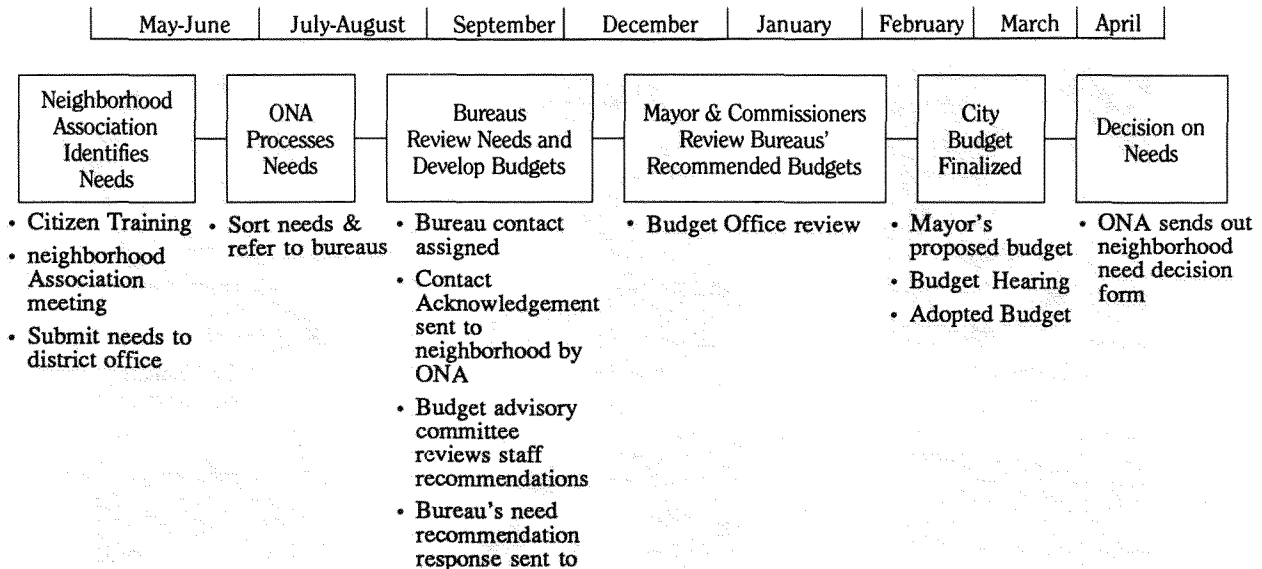


OFFICE OF NEIGHBORHOOD ASSOCIATIONS (ONA)

The OFFICE OF NEIGHBORHOOD ASSOCIATIONS (ONA) is a City bureau, funded by General Fund dollars. It promotes citizen participation and communication among neighborhoods throughout the City. City Council established ONA in 1974. They designated it as the vehicle for communication between City Hall and the citizens of Portland. Today, ONA supports a number of citizen involvement programs, including the 85 neighborhood associations and six District Coalition Boards active throughout the City. NEIGHBORHOOD ASSOCIATIONS are the heart of all neighborhood activities. A legal entity, each association is governed by citizen written by-laws that determine boundaries, the election and function of officers, and the frequency of meetings. Every association reflects the issues and needs of its members. NEIGHBORHOOD ASSOCIATIONS need active citizens to reflect the needs and views within the boundaries identified by each association.

NEIGHBORHOOD NEEDS PROCESS: City residents identify neighborhood needs at general membership or board meetings, or through neighborhood surveys or petitions. These need reports are returned to ONA for distribution to the proper City bureaus and agencies. ONA then monitors the progress of the need reports throughout the process, and encourages direct, open communications between the neighborhood contact persons and the bureau representatives. The NEIGHBORHOOD NEEDS PROCESS is the formal course established by the City to plan, design, fund and implement projects that affect the City budget. Although many concerns can be accomplished working with the NEIGHBORHOOD ASSOCIATIONS on a daily basis, the process is the time frame, actors and actions in the NEIGHBORHOOD NEEDS PROCESS.

NEIGHBORHOOD NEEDS PROCESS



Contact the neighborhood Office nearest from you listed under "Neighborhood Associations" on page 12 of this directory. If you want to help form a Neighborhood Association in your area or need to know if one is established, call ONA CityHall, 248-4519



CITIZEN BUREAU ADVISORY COMMITTEES (BAC) place citizens in a partnership role throughout the City's budget process. Through the OFFICE OF NEIGHBORHOOD ASSOCIATIONS (ONA), interested residents apply for appointment to budget review committees. Selection is then made by members of the City Council. Over five hundred dedicated citizens have assisted City officials in creating fiscal policies that are responsive to the needs of all Portland citizens. In 1980 the City Council adopted a resolution formalizing the Citizens Bureau Advisory Committee process. The BAC goals:

- To help produce a final budget that is responsive to the wishes and needs to citizens of Portland.
- To increase understanding of the City budget and the budget process.
- To enable citizens to address policy questions of the City and of its individual bureaus and departments.
- To enable to review and recommend reductions and additions in City services through the budget review process.

ONA coordinates and assists the BAC process, and staffs the Bureau Advisory Coordinating Committee (BACC) which is composed of representatives from each BAC.

If you want to use your talent and expertise to volunteer to assist the budgetary process of the City of Portland, please contact ONA, 248-4519, to make application.

NEIGHBORHOOD CRIME PREVENTION PROGRAMS: In 1978, citizens concerned about crimes in their neighborhoods decided to take action and established a program to educate neighbors about crime prevention techniques. Today the seven District Coalition Boards manage neighborhood crime prevention programs, located throughout the City. These programs utilize various anti-crime strategies hand tailored to each neighborhood. The common goals for the programs include:

- Establishing a network of Neighborhood Watch blocks throughout the City where citizens agree to watch other for each other.
- Providing citizens with basic crime prevention information to increase their personal safety and home security.
- Providing coordination and technical assistance to neighborhoods that are experiencing crisis or chronic crime problems.
- Encouraging cooperation between police and neighborhood residents.

If you want to start a crime prevention program in your neighborhood, contact the Neighborhood Crime Prevention Coordinator in your area listed in this directory under "Neighborhood Crime Prevention Program" on page 12.

NEIGHBORHOOD MEDIATION CENTER: Conflicts and disputes between neighbors are one of the unfortunate aspects of City life. The CENTER provides a positive alternative to the courts in solving many of these problems. Professional mediators and trained volunteers help resolve problems on a one to one basis without lawyers, judges, and high court fees. The CENTER also works to mediate problems involving business organizations, Neighborhood Associations, non-profit agencies, school districts, and the Housing Authority of Portland. FOR ASSISTANCE, CONTACT "NEIGHBORHOOD MEDIATION" IN DIRECTORY.

YOU CAN MADE A DIFFERENCE AS A CITIZEN OF THE CITY OF PORTLAND.

A. ONA Administrative Office 248-4519
 Bureau Advisory Committees
 Neighborhood Needs
 General Information

B. District Coalition Offices
 Crime Prevention & Citizen Participation

* Central Northeast Neighbors 243-7357
 * Downtown/Burnside Crime Prevention 224-8684
 * Mid-County Neighbors 243-7357
 * Neighbors North 248-4524
 (Crime Prevention) 286-9214
 * Northeast Coalition of Neighborhoods 248-4575
 * Neighborhoods West/Northwest 223-3331
 * Southeast Uplift 232-0010
 * Southwest Neighborhood Information, Inc. 248-4592

C. Neighborhood Mediation Center 243-7320



PLANNING & ZONING

City Boundaries	796-7714
Permit Center Information	796-7526
Planning/Zoning Information	796-7526
Flood Plain Regulations	796-7103

POLICE

Police Emergency	911/790-2212/TDD
Accident Information	248-5688
Detention Center Information	248-5245
Office of the Chief	796-3000
Precincts:	
Central	796-3097
North	248-5720
East	248-5696
To Report Stolen Property & Bicycles -- Ask for "Non-Emergency Line"	911
Detective Division	796-3400

PUBLIC LIBRARY SERVICE FOR PORTLAND & MULTNOMAH COUNTY

Central Library, 801 SW 10th Avenue	223-7201
Albina, 3605 NE 15th Avenue	287-7147
Belmont, 1038 SE 39th Avenue	232-3581
Capitol Hill, 10723 SW Capitol Highway	244-9620
Gregory Heights, 7921 NE Sandy Boulevard	284-1611
Gresham, 401 N Main, Gresham	665-2222
Holgate, 7905 SE Holgate Boulevard	771-3475
Hollywood, 3930 NE Hancock	281-0826
Midland, 805 SE 122nd Avenue	252-1164
North Portland, 512 N Killingsworth	284-5622
Rockwood, 17917 SE Stark Street	665-9440
St. Johns, 7510 N Charleston	286-0562
Sellwood-Moreland, 7904 SE Milwaukie Avenue	236-4014
Southwest Hills, 1550 SW Dewitt	246-2944
Woodstock, 6008 SE 49th Avenue	771-3538

(CITY) PURCHASING

Purchasing Information	796-6855
Minority/Female Business Enterprise Certification	796-5288



RECREATION/CULTURAL

Portland Parks & Recreation Information	796-5193
Sports Information	796-5150
Permits:	
Ballfield, Gym	796-5155
Weddings & Permits	796-5193
Civic Stadium	248-4345
Forestry Center	228-1367
Memorial Coliseum Ticket/Event Information	239-4422
Metropolitan Arts Commission	796-5111
OMSI, Information (Rates & Hours)	228-6674
Oregon Historical Society	222-1741
Oregon Symphony Association Ticket Office	228-1353
Performing Arts Center:	
Business Office	248-4335
Arlene Schnitzer Concert Hall	248-4496
Civic Auditorium Tickets	248-4496
Pioneer Courthouse Square	223-1613
Portland Art Museum	226-2811
Portland Opera Association	241-1401
Rose Festival Association	227-2681
Zoo, Washington Park Zoo (Rates & Hours)	226-7627

PUBLIC GARDENS

Forest Park, 2960 NW Upshur	248-4492
Hoyt Arboretum, 4000 SW Fairview Boulevard	228-8733
Japanese Garden, Washington Park	223-1321
Mt. Tabor Park, SE Salmon & 60th	255-5605
Leach Gardens, SE 122nd & Johnson Creek Road	761-9503
Washington Park, 400 SW Kingston	248-4302
Peninsula Park, Ainsworth & N Albina	285-1185
Laurelhurst Park, SE 39th & Stark	236-5526
Crystal Springs Rhododendron Gardens, SE 28th(1 block N of Woodstock)	796-5122

CITY ARTS

Pittock Mansion, 3229 NW Pittock Drive	248-4469
Children's Museum, 3037 SW Second Avenue	248-4587
Metro Dance Center, 6433 NE Tillamook	282-5061
Community Music Center, 3350 SE Francis	231-1955
Firehouse Theater, 1436 SW Montgomery	248-4737
Interstate Firehouse Cultural Center, 5340 N Interstate	243-7930
Multnomah Art Center, 7688 SW Capitol Highway	248-4444
Theatre Workshop, 511 SE 60th	235-4551

COMMUNITY CENTERS

Fulton, 68 SW Miles	244-8449
Hillside, 653 NW Culpepper Terrace	223-8992
Matt Dishman, 77 NE Knott	282-1460
Montavilla, 8219 NE Glisan	254-4101
Mt. Scott, 5530 SE 72nd	774-8156
Mt. Scott Roller Rink, 5530 SE 72nd	774-2215
Overlook House, 3839 N Melrose	282-2053
Peninsula, 6400 N Albina	285-4222
St. Johns, 8427 N Central	286-1551
Sellwood, 1436 SE Spokane	236-4022
University Park, 9009 N Foss	289-2414
Woodstock, 5906 SE 43rd	771-0784

COMMUNITY SCHOOLS

Abernethy Community School, 2421 SE Orange	280-6193
Alameda Community School, 2732 NE Fremont	284-1686
Atkinson Community School, 5800 SE Division	280-6335
Binnsmead Community School, 2225 SE 87th	280-5703
Bridlemile Community School, 4300 SW 47th Drive	280-6294
Brooklyn Community School, 3830 SE 14th	280-6202
Gregory Heights Community School, 7334 NE Siskiyou	280-5606
Irvington Community School, 1320 NE Brazee	280-6188
Markham Community School, 10625 SW 35th	280-5682
Metropolitan Learning Center Community School, 2033 NW Glisan	280-5742
Mt. Tabor Community School, 5800 SE Ash Street	280-5649
Ockley Green Community School, 6031 N Montana	280-5663
Portsmouth Community School, 5103 N Willis Boulevard	280-5671
Scott Community School, 6700 NE Prescott	282-0204
Sunnyside Community School, 3421 SE Salmon	280-6228

DISABLED CITIZENS RECREATION

Disabled Citizen Recreation, 426 NE 12th	248-4328/VOICE/TDD
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SENIOR RECREATION

Senior Leisure Services, 426 NE 12th	248-4328
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OUTDOOR RECREATION

1120 SW 5th, Room 502	796-5132
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RECREATION FACILITIES

Portland Tennis Center, 324 NE 12th	233-5959
St. Johns Racquet Center, 7519 N Burlington	248-4200
City Golf Courses, 1120 SW 5th	796-5104
Portland International Raceway, 1940 N.Victoria Blvd., (West Delta Park)	285-6635



SERVICES

Park & Street Tree Permits Forestry Division, 10850 N Denver	248-4489
Facilities & Grounds Maintenance	248-4397
Community Gardens, 6437 SE Division	248-4777
Volunteer Services, 1120 SW 5th	796-5193

SPORTS

1120 SW 5th	796-5150
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SWIMMING POOLS

Buckman, 320 SE 16th	236-0704
Columbia, 7701 N Chatauqua	283-6848
MCL, 2033 NW Glisan	227-6075

RECYCLING

METRO Recycling Information Center	224-5555
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REFUGEES

Government & Community Coordination	248-4519
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RESIDENTIAL CARE FACILITIES

Group Homes, Mentally & Physically Handicapped, Alcohol, Drug, Battered Women, Corrections, Youth Diversion	248-4613
Multnomah County Adult Care Homes Information	248-3000

SENIOR SERVICES

Portland/Multnomah Commission on Aging	796-5269
Multnomah County Aging Services Division	248-3646

BRANCH OFFICES

West, 1819 NW Everett	248-5460
NE, 10 N Russell	248-5470
East, 4531 SE Belmont	248-5480
SE, 4707 SE Hawthorne	233-5000

Adult Housing Program	248-3000
Public Guardian	248-3948
Adult Protective Services	248-3646

NEIGHBORHOOD SENIOR SERVICES:

North Community Actions Council, 7506 N Chicago	285-5044
NEAR NORTHEAST-Urban League Senior Adult Center, 10 NE Russell	280-2600
NORTHEAST-Hollywood Senior Center, 1820 NE 40th Avenue	288-8303
DOWNTOWN-Northwest Pilot Project, 1030 SW 3rd Avenue	227-5605
NORTHWEST-Friendly House Senior Center, 1819 NW Everett Street	224-2640
SOUTHWEST-Neighborhood House, Aging Services, 7780 SW Capitol Highway	246-1663
SOUTHEAST-IMPACT Senior Service Center, 4707 SE Hawthorne Boulevard	233-5000
EAST COUNTY-Multnomah County Community Action Agency-Aging Services	777-4761

SENIOR CENTERS

Friendly House Senior Center, 1819 NW Everett Street	224-2640
Hollywood Senior Center, 1820 NE 40th	288-8303
Errol Heights Senior Center, 4937 SE Woodstock	774-2582
Neighborhood House Senior Center, 7688 SW Capitol Highway	244-5204
IMPACT, Inc. Senior Center, 4707 SE Hawthorne Boulevard	233-5000
Peninsula Senior Center, 7508 N Hereford	289-8208
Urban League Senior Center, 10 N Russell	280-2600
Gresham Seniors United	665-7191
OASIS	241-3059

SENIOR MEALS

Loaves & Fishes Centers, Inc., 6125 SE 52nd Avenue	777-2424
Japanese Ancestral Society, IKOI-NO-KAI, 1333 SE 28th	232-5253
Mittleman Jewish Community Center, 6651 SW Capitol Highway	244-0111
Urban Indian Council, 5938 N Greeley	289-6391
Oregon Human Development Corporation, 1623 NW 14th	274-1395

IN-HOME SERVICES

Visiting Nurse Association, 3611 SW Hood Avenue	220-1000
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INFORMATION/REFERRAL

United Way Information & Referral	222-5555
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LEGAL SERVICES

Legal Aid Services, Multnomah Bar Association, 310 SW 4th Avenue	224-4094
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SENIOR HEALTH SCREENING PROGRAM

Healthlink	227-7288
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Senior Services (continued)

MENTAL HEALTH

Senior Health Services, Good Samaritan Hospital 229-7866
Mt. Hood Community Mental Health Center 661-5455

HOME REPAIR & MAINTENANCE

Senior Job Center, PCC Sylvania, 12000 SW 49th 244-6111 x582

SPECIAL NEEDS TRANSPORTATION PROGRAM

Tri-Met, 4012 SE 17th 238-4952/238-5811/TDD

SEWERS

SEWER INFORMATION

Emergency & Maintenance, Weekdays 248-5546
Nights & Weekends 248-5506
Clogged Storm Drains 248-5542
Sewer Availability 796-7091
Sewer Rates & Connection Fees 796-7009
Sewer Connection Permits & General Information 796-7002
Construction Sites 796-7006
Mid-County Sewer Project Customer Service Center 248-4114
INDUSTRIAL DISCHARGES 796-7180
SOLID WASTE (Garbage) Information 796-7010
Storm Water Management 796-7100

SIDEWALKS

Curb Ramps & Handicap Access: Transportation 796-7082
Repair & Improvement: Maintenance 248-4111
New Construction 796-7002
Obstructions, Neighborhood Division 796-7306

SISTER-CITIES PROGRAM

Sapporo, Japan; Guadalajara, Mexico; & Corinto, Nicaragua . 248-4572 or 248-4266



STREETS

Closures: Central Business District	796-7365
Closures: Transportation	796-7002
Lighting, Information, Outages: Transportation	796-5197
Leaf Removal: Transportation	248-5515
Repair Pot Holes & Street Repair	248-5515
Cleaning, Emergency Clearing of Obstruction, Removal of Broken Glass -- Weekdays	248-5515
Nights	248-5545
General Street Information (Will determine if City, County or State responsibility)	796-7002
Road Conditions, State Department of Transportation (Highways)	238-8400
Street Paving	248-5545
Street Use Permits	796-7385

TRAFFIC PROBLEMS

Complaints, Information on Signals, Stop Signs, Flow: Traffic Management	796-5185
Enforcement of Laws, Non-Emergency: Police Bureau	248-5688
Parking Meter Repair	248-5545
Repair of Traffic Lights, Signals, Signs	248-5545
Parking Enforcement	796-5195
On Street Parking Concerns	796-5185
Traffic Tickets, Multnomah County Information	248-3511
Planning	796-7704

URBAN SERVICES PROGRAM

Public Information for Urban Services	796-6847
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WATER

Emergencies (broken water mains, severe leaks, fire hydrants, all hours)	248-4874
Customer Service	796-7770
Credit & Collections	796-7426
Move In/Out	796-7530
New Installation & Permits	796-7310
Water Meter Repair	248-4874

YOUTH SERVICES

Youth Service Center Coordinator	796-5201
Metropolitan Youth Commission	796-5201
North Portland Youth Service Center, 7704 N Hereford	285-0627
Northeast Youth Service Center, 10 N Russell	280-2600
Outer East Youth Service Center, 6036 SE Foster Road	294-3322
Southeast Youth Service Center, 926 SE 45th	231-9578
Westside Youth Service Center, 7688 SW Capitol Highway	245-4441



Some of the agencies listed are joint City/County/Metro/State services.
Addresses listed in blue pages of Telephone Book.

Prepared by the Urban Services Division
1120 SW Fifth Avenue, Room 1250, Portland, Oregon
Call 796-6847 for additional copies of this brochure.
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