



MULTNOMAH COUNTY OREGON

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

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

AGENDA OF
MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS
FOR THE WEEK OF
September 18 - 22, 1989

Tuesday September 19, 1989 - 1:30 PM - Informal Meeting . . Page 2
Thursday September 21, 1989 - 1:30 PM- Formal Meeting . . . Page 3
Work Session

Tuesday, September 19, 1989 - 1:30 PM

Multnomah County Courthouse, Room 602

INFORMAL BRIEFINGS

1. MERC/ERC Consolidation, update by Public Financial Management, Inc. - Rebecca Marshall, Paul Yarborough.

TIME CERTAIN 1:30 PM

2. Briefing to provide information about the teen clinic summer program and update the Board on the teen clinic siting process currently underway in Portland, Centennial and Parkrose School Districts - Ann Cathey.
3. Monthly library update - Mike Dolan.

PUBLIC TESTIMONY WILL NOT BE TAKEN AT INFORMAL MEETINGS

Thursday, September 21, 1989 - 9:30 AM

Multnomah County Courthouse, Room 602

Formal Agenda

REGULAR AGENDA

DEPARTMENT OF GENERAL SERVICES

- R-1 DGS Budget Modification to reclassify a Financial Specialist 1 position in the Division of Assessment & Taxation to an Administrative Specialist 1 position.

DEPARTMENT OF HUMAN SERVICES

- R-2 DHS Budget Modification DHS #3 increasing the Aging Services Division, Community Action Program FY 89/90 Materials and Services Budget by \$138,383 to reflect revenue which was unanticipated in the original budget.
- R-3 DHS Budget Modification DHS #5 increases Social Services Division budget to reflect COLA awarded in Amendment #4 to the State Mental Health Division Grant.
- R-4 DHS Budget Modification DHS #7 appropriates \$4,000 of local 2145 (beer and wine tax) revenue for A&D prevention conference scholarships and related trainings.
- R-5 DHS Budget Modification DHS #8 to increase the MED Children's Clinical Services budget a net total of \$68,083 for FY 89/90 to reflect Robert Wood Johnson Foundation revenue awarded via Amendment #5 to the State Mental Health Grant.
- R-6 In the matter of approval of Notice of Department of Health and Human Services Linking Networks Grant Award and Accompanying Budget Modification (DHS #10). Submitted as one item.

DEPARTMENT OF JUSTICE SERVICES

- R-7 In the matter of application for a package store (new outlet) license for the Jackpot Food Mart, 28210 S. E. Orient Drive; applicants Donald L. and Marjorie N. Williams with recommendations for approval from Sheriff's Office.

BOARD OF COUNTY COMMISSIONERS

- R-8 Resolution in the matter of providing instructions to the Elections Clerk not to require a bond, cash deposit, or other security deposit from the petitioners in PUD proceedings under ORS 261.

BOARD OF COUNTY COMMISSIONERS (Continued)

- R-9 Resolution in the matter of Petition for Formation of the Rockwood Water Peoples Utility District.
- R-10 Resolution in the matter of commemorating the 25th anniversary of Economic Opportunity Act of 1964 and declaring week of September 24 - 30, 1989 as Economic Opportunity Week.
- R-11 In the matter of appointments of Sara Lamb to the District Attorneys Citizen Budget Advisory Committee; Vivian Starbuck to the Auditors Citizen Budget Advisory Committee; Mark Prater to the Auditors Citizen Budget Advisory Committee; and reappointments of Marlene Byrne to the General Services Citizen Budget Advisory Committee; Jim Worthington to the Nondepartmental Citizen Budget Advisory Committee; Bob Luce to the Environmental Services Citizen Budget Advisory Board; Frank Howatt to the General Services Citizen Budget Advisory Committee; Lawrence McCagg to the Justice Services Citizen Budget Advisory Committee; Andy Thaler to the District Attorneys Citizen Budget Advisory Committee; and Mary Elizabeth Schwoefferman to the Sheriff's Office Citizen Budget Advisory Committee.
- R-12 In the matter of the appointment of Chuck Wyland, Nancy Gorshe and Kate Drew to the Portland/Multnomah Commission on Aging and the reappointment of Augustus Morgan, William French and Elizabeth Davis to the Portland/Multnomah Commission on Aging.
- R-13 In the matter of the appointment of Karma Sweet and Rachel Summer to the Sheriff's Citizen Budget Advisory Committee and the reappointment of Don Church to the Sheriff's Citizen Budget Advisory Committee..
- R-14 In the matter of creation of a five-member City/County Housing Management Plan Development Council to supervise the analysis and policy review required to develop a county-wide Housing Management Plan.

WORK SESSION

Continuing Discussion Regarding Corrections Issues

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

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

SUPPLEMENTAL AGENDA

THURSDAY, SEPTEMBER 21, 1989

WORK SESSION - Continuing Discussion Regarding Corrections Issues

CANCELLED

0500C.73

ANNOTATED AGENDA

MULTNOMAH COUNTY BOARD OF COMMISSIONERS
Thursday September 21, 1989
Multnomah County Courthouse, Room 602

DEPARTMENT OF GENERAL SERVICES

- R-1 DGS Budget Modification to reclassify a Financial Specialist 1 position in the Division of Assessment & Taxation to an Administrative Specialist 1 position.

APPROVED

DEPARTMENT OF HUMAN SERVICES

- R-2 DHS Budget Modification DHS #3 increasing the Aging Services Division, Community Action Program FY 89/90 Materials and Services Budget by \$138,383 to reflect revenue which was unanticipated in the original budget.

APPROVED

- R-3 DHS Budget Modification DHS #5 increases Social Services Division budget to reflect COLA awarded in Amendment #4 to the State Mental Health Division Grant.

APPROVED

- R-4 DHS Budget Modification DHS #7 appropriates \$4,000 of local 2145 (beer and wine tax) revenue for A&D prevention conference scholarships and related trainings.

APPROVED

- R-5 DHS Budget Modification DHS #8 to increase the MED Children's Clinical Services budget a net total of \$68,083 for FY 89/90 to reflect Robert Wood Johnson Foundation revenue awarded via Amendment #5 to the State Mental Health Grant.

APPROVED

- R-6 In the matter of approval of Notice of Department of Health and Human Services Linking Networks Grant Award and Accompanying Budget Modification (DHS #10). Submitted as one item.

APPROVED

DEPARTMENT OF JUSTICE SERVICES

- R-7 In the matter of application for a package store (new outlet) license for the Jackpot Food Mart, 28210 S. E. Orient Drive; applicants Donald L. and Marjorie N. Williams with recommendations for approval from Sheriff's Office.

APPROVED

BOARD OF COUNTY COMMISSIONERS

- R-8 Resolution in the matter of providing instructions to the Elections Clerk not to require a bond, cash deposit, or other security deposit from the petitioners in PUD proceedings under ORS 261.

APPROVED

BOARD OF COUNTY COMMISSIONERS

- R-9 Resolution in the matter of Petition for Formation of the Rockwood Water Peoples Utility District.

RESOLUTION DENIED-PUBLIC HEARING SET FOR NOVEMBER 2, 1989 TO DETERMINE BOUNDARIES OF PUD.

- R-10 Resolution in the matter of commemorating the 25th anniversary of Economic Opportunity Act of 1964 and declaring week of September 24 - 30, 1989 as Economic Opportunity Week.

APPROVED

- R-11 In the matter of appointments of Sara Lamb to the District Attorneys Citizen Budget Advisory Committee; Vivian Starbuck to the Auditors Citizen Budget Advisory Committee; Mark Prater to the Auditors Citizen Budget Advisory Committee; and reappointments of Marlene Byrne to the General Services Citizen Budget Advisory Committee; Jim Worthington to the Nondepartmental Citizen Budget Advisory Committee; Bob Luce to the Environmental Services Citizen Budget Advisory Board; Frank Howatt to the General Services Citizen Budget Advisory Committee; Lawrence McCagg to the Justice Services Citizen Budget Advisory Committee; Andy Thaler to the District Attorneys Citizen Budget Advisory Committee; and Mary Elizabeth Schwoefferman to the Sheriff's Office Citizen Budget Advisory Committee.

APPROVED

- R-12 In the matter of the appointment of Chuck Wyland, Nancy Gorshe and Kate Drew to the Portland/Multnomah Commission on Aging and the reappointment of Augustus Morgan, William French and Elizabeth Davis to the Portland/Multnomah Commission on Aging.

APPROVED

R-13 In the matter of the appointment of Karma Sweet and Rachel Summer to the Sheriff's Citizen Budget Advisory Committee and the reappointment of Don Church to the Sheriff's Citizen Budget Advisory Committee..

APPROVED

R-14 In the matter of creation of a five-member City/County Housing Management Plan Development Council to supervise the analysis and policy review required to develop a county-wide Housing Management Plan.

APPROVED

BOARD OF COUNTY COMMISSIONERS
 FORMAL BOARD MEETING
 RESULTS

MEETING DATE: 9-21-89

Agenda Item #	Motion	Second	APP/NOT APP
<u>R-1</u>	<u>GK</u>	<u>SK</u>	<u>App</u>
<u>R-2</u>	<u>SK</u>	<u>GK</u>	}
<u>R-3</u>	<u>SK</u>	<u>GK</u>	
<u>R-4</u>	<u>SK</u>	<u>GK</u>	
<u>R-5</u>	<u>SK</u>	<u>GK</u>	
<u>R-6</u>	<u>SK</u>	<u>GK</u>	
<u>R-7</u>	<u>GK</u>	<u>SK</u>	
<u>R-8</u>	<u>GK</u>	<u>SK</u>	
#2 <u>R-9</u>	<u>SK</u>	<u>GK</u>	<u>App</u>
<u>R-10</u>	<u>GK</u>	<u>SK</u>	<u>App</u>
<u>R-11</u>	<u>GK</u>	<u>SK</u>	<u>App</u>
<u>R-12</u>			} Appoint members
<u>R-13</u>			
<u>R-14</u>	<u>GK</u>	<u>SK</u>	

Motion to set
 a hearing date
 on 11-2-89 on
 Rockwood Pub

BUDGET MODIFICATION NO. DGS 5

(For Clerk's Use) Meeting Date 9/21/89
Agenda No. 2-1

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date)

DEPARTMENT GENERAL SERVICES DIVISION ASSESSMENT AND TAXATION
 CONTACT John Riles TELEPHONE 248-3345
 *NAME(S) OF PERSON MAKING PRESENTATION TO BOARD _____

SUGGESTED

AGENDA TITLE (to assist in preparing a description for the printed agenda)

Assessment and Taxation budget modification to move position from Tax Collection/ Personnel to Technical Support/Personnel

(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET

The purpose of this Bud Mod is to reclassify a Financial Specialist 1 position in the Division of Assessment & Taxation to an Administrative Specialist 1 position.

This Bud Mod will:

Move \$30,420 from Org 7630/Tax Collection Personnel (from a vacant Financial Specialist 1 position) to Org 7566/Technical Support Personnel.

While the Financial Specialist 1 position is still necessary, the Administrative Specialist 1 position is more critical for immediate needed systems changes to accommodate the installation of HB 2338. With the implementation of 2338 we will replace the Financial Specialist 1 position. (Funds from 5% holdback of property conveyance fee which is anticipated to be available January, 1990.)

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)

No budget impact.

4. CONTINGENCY STATUS (to be completed by Finance/Budget)

Contingency before this modification (as of _____) \$ _____
 (Specify Fund) (Date)
 After this modification \$ _____

Originated By <u>Ann M. Dow</u> Finance/Budget	Date <u>8-31-89</u>	Department Director <u>Linda D. Alexander</u> Employee Relations.	Date <u>8/31/89</u>
<u>Joseph M. Campbell</u> Board Approval	Date <u>9-1-89</u>	<u>Donald H. Winkley</u> Date	<u>9-6-89</u>
<u>Carrie Patterson</u>	<u>9-21-89</u>		

REQUEST TO CREATE/RECLASSIFY A POSITION

- 1. List the proposed duties of the position (please do not copy from the class specification):
 - a. Support A & T computers: Lead support of A & T PC's; lead support of A & T remittance processing; back-up support of Data Entry XL 40; back-up support of A & T WANG system.
 - b. Install and maintain software on supported computers. Develop software for IBM compatible PC's.
 - c. Design, code, and test programs for information requests.
 - d. Analyze and document system requests for ISD work on the mainframe system. Coordinate request fulfillment with ISD.
 - e. Lead research and evaluation of A & T computer products for PC's etc. at A & T.

Use the reverse side or attach additional sheets, if needed.

2. State the proposed classification title:

Administrative Specialist I

3. Is this a new position? Yes No

4. If this is an existing position, state the name of the incumbent:

N/A

5. Proposed effective date of change: 9/15/89

Hiring Manager: John Riles

Date: _____ Department/Division: Assessment & Taxation

EMPLOYEE SERVICES DIVISION USE ONLY:

- Action: Approved as submitted
 Approved for classification title
 Denied (for Reclassification Requests only)

Analyst Name: Donald W. Winkley Date: 9/6/89

BUDGET MODIFICATION NO. DHS # 3

(For Clerk's Use) Meeting Date 9/21/89
Agenda No. R-2

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date)

DEPARTMENT HUMAN SERVICES DIVISION AGING SERVICES
CONTACT BILL THOMAS TELEPHONE 248-5464
*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD DUANE ZUSSY/JIM MCCONNELL/BILL THOMAS

SUGGESTED
AGENDA TITLE (to assist in preparing a description for the printed agenda)

Budget Modification DHS # 3 increasing the Aging Services Division, Community Action Program FY 89-90 Materials and Services Budget by \$138,383.

(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET

The modification adds a total of \$138,383 (\$133,165 in pass-through monies; \$4,009 in printing, postage, and education and travel; and \$1,209 in indirect service reimbursement) to reflect revenue which was unanticipated in the original budget.

The additional funds include \$125,000 in monies from the Department of Health and Human Services (Demonstration Partnership Program), which were originally anticipated for use in FY 90-91, and \$13,290 in Stripper Well (Petroleum Violation Escrow) funds from State Community Services which are being carried over from FY 88-89.

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)

Increase 2096/Demonstration Partnership Program by \$125,000, to a total of \$250,000
Increase 2077/Stripper Well by \$13,290, to a total of \$396,635
Increase 7608/County General Fund Transfer by \$93
Increase 6602/Service Reimbursement from the Fed/State Fund to General Fund by \$1,209

4. CONTINGENCY STATUS (to be completed by Finance/Budget)

Contingency before this modification (as of _____) \$ _____
(Specify Fund) (Date)
After this modification \$ _____

Originated By _____ Date 8/11/89 Department Director _____ Date 9/7/89
Jim McConnell Finance/Budget _____ Employee Relations _____
Board Approval _____ Date _____
Bill Thomas _____
Chris Parkerson 9-21-89

EXPENDITURE

TRANSACTION EB [] GM [] TRANSACTION DATE _____ ACCOUNTING PERIOD _____
 BUDGET FY _____

Document Number	Action	Fund	Agency	Organi- zation	Reporting Activity	Category	Object	Current Amount	Revised Amount	Change Increase (Decrease)	Sub- Total	Description
		156	010	0130			6060	\$3,668,986	\$3,802,151	\$133,165		Pass-through
		156	010	0130			6120	\$ 6,000	\$ 8,000	\$ 2,000		Printing
		156	010	0130			6200	\$ 3,080	\$ 4,089	\$ 1,009		Postage
		156	010	0130			6310	\$ 4,775	\$ 5,775	\$ 1,000		Education and Travel
		156	010	0130			7100	\$ 80,483	\$ 81,692	\$ 1,209		Indirect Service Reim.
											\$138,383	Org. 0130 Total
		100	010	0105			7608			\$ 93		Cash Transfer to F/S Fund
		100	045	9120			7700			\$ 1,116		Contingency
TOTAL EXPENDITURE CHANGE										\$139,592	TOTAL EXPENDITURE CHANGE	

REVENUE

TRANSACTION RB [] GM [] TRANSACTION DATE _____ ACCOUNTING PERIOD _____
 BUDGET FY _____

Document Number	Action	Fund	Agency	Organi- zation	Reporting Activity	Category	Revenue Source	Current Amount	Revised Amount	Change Increase (Decrease)	Sub- Total	Description
		156	010	0130			2096	\$125,000	\$250,000	\$125,000		DPP
		156	010	0130			2077	\$383,345	\$396,635	\$ 13,290		Stripper Well
		156	010	0130			7601	\$563,089	\$563,182	\$ 93		County General Fund
		100	045	7410			6602			\$ 1,209		Svs Reim F/S to Gen. Fund
TOTAL REVENUE CHANGE										\$139,592	TOTAL REVENUE CHANGE	



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN SERVICES
AGING SERVICES DIVISION
COMMUNITY ACTION PROGRAM OFFICE
426 S.W. STARK, 5TH FLOOR
PORTLAND, OREGON 97204
(503) 248-5464

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

MEMORANDUM

TO: Gladys McCoy, Multnomah County Chair

VIA: Duane Zussy, Director, Department of Human Services

FROM: Jim McConnell, Director, Aging Services Division

DATE: August 9, 1989

SUBJECT: Recommendation for Approval of Attached Budget Modification

RECOMMENDATION: The Aging Services Division recommends approval by the Board of County Commissioners of the attached budget modification DHS # 3.

ANALYSIS: The budget modification increases the Aging Services Division, Community Action Program FY 89-90 materials and services budget by \$138,383 to reflect revenue unanticipated at the time the original budget was approved.

One-hundred-twenty-five-thousand-dollars (\$125,000) of the increase derives from federal Department of Health and Human Services grant funds awarded to the County. Originally it was thought one-half of the two year grant of \$250,000 would be spent in FY 89-90, while an equal amount would be spent in FY 90-91; however, it has become clear that the nature of the research involved in the project dictates the majority of the grant be spent during FY 89-90. Any amounts unspent during FY 89-90 will be carried forward to FY 90-91; the federal grant period extends through June 30, 1991.

In addition to the DHHS funds, the modification adds \$13,290 in State Community Services (SCS) funds for the Summer Youth Employment Program which were incorrectly anticipated to be spent by Human Solutions, Inc., in FY 88-89 and are now being carried over to FY 89-90. Finally, this modification increases the cash transfer from the County General Fund to the Federal/State Fund by \$93 and increases the service reimbursement from the Federal/State Fund to the County General Fund by \$1,209.

BACKGROUND: Approval by the Board of County Commissioners of the notice of grant award from DHHS is being requested simultaneously with this modification. Revenue from State Community Services has previously been approved by the Board in DHS contract #104229.

DHHS funds will be contracted to Portland Impact for direct services to homeless families and to Portland State University, Regional Research Institute to conduct an evaluation. SCS funds will be contracted to Human Solutions, Inc., for the Summer Youth Employment Program. Appropriate contracts and contract amendments are currently being processed by the Division.

[0002f/16]

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date)

DEPARTMENT Human Services DIVISION Social Services
CONTACT Susan Clark TELEPHONE 248-3691
*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD Duane Zussy

SUGGESTED

AGENDA TITLE (to assist in preparing a description for the printed agenda)

Budget Modification DHS # 5 increases Social Services Division budget to reflect COLA awarded in Amendment #4 to the State Mental Health Division.

(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

[] PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET

Budget Modification DHS # 5 requests board approval to make adjustments within various SSD budgets to reflect Amendment #4 to the State Mental Health Grant.

At budget preparation time, a 4% COLA was estimated for SMH revenue. This bud mod adjusts anticipated to actual state contract amounts. Specific programs include:

DD Contracts increased a net total of \$787,894 for COLA adjustments and additional early intervention and residential services.

MED Contracts reduced a net total of (\$78,509). Additional revenue is anticipated from the state to cover contracted services.

A&D Contracts reduced a net total of (\$48,167) to reflect actual contracted service levels.

The Local Administration increase of \$33,743 will be appropriated at a later date when specific division needs have been identified.

DD case management COLA will be forthcoming and appropriated in a future bud mod when the state amendment is received.

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)

State Mental Health Grant increased by net total of \$661,218.
CGF increased by \$4,628. (indirect)
Service reimbursement F/S to CGF \$4,628.

4. CONTINGENCY STATUS (to be completed by Finance/Budget)

Contingency before this modification (as of _____) \$ _____
(Specify Fund) (Date)
After this modification \$ _____

Originated By _____ Date 8/31/89 Department Manager _____ Date 9/7/89
Budget Analyst Susan Clark Date _____ Personnel Analyst _____ Date _____
Board Approval Chris A. Patterson 9-21-89 Date _____

EXPENDITURE

TRANSACTION EB []		GM []	TRANSACTION DATE _____		ACCOUNTING PERIOD _____		BUDGET FY _____				
Document Number	Action	Fund	Agency	Organi- zation	Reporting Activity Category	Object	Current Amount	Revised Amount	Change Increase (Decrease)	Sub- Total	Description
		156	010	1215		6060			787,894		Increase pass through
		156	010	1215		7100			5,515		Increase Indirect (.007)
										793,409	Total Org. 1215
		156	010	1305		6060			(78,509)		Decrease Pass Through
		156	010	1305		7100			(550)		Decrease Indirect (.007)
										(79,059)	Total Org. 1305
		156	010	1415		6060			(48,167)		Increase Pass Through
		156	010	1415		7100			(337)		Decrease Indirect (.007)
										(48,504)	Total Org. 1415
		100	010	0104		7608			4,628		Cash Transfer

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 TOTAL EXPENDITURE CHANGE ////////////////////////////////////// 670,474 TOTAL EXPENDITURE CHANGE

REVENUE

TRANSACTION RB []		GM []	TRANSACTION DATE _____		ACCOUNTING PERIOD _____		BUDGET FY _____				
Document Number	Action	Fund	Agency	Organi- zation	Reporting Activity Category	Revenue Source	Current Amount	Revised Amount	Change Increase (Decrease)	Sub- Total	Description
		156	010	1215		2605			787,894		SMH Grant
		156	010	1215		7601			5,515		CGF
		156	010	1305		2605			(78,509)		SMH Grant
		156	010	1305		7601			(550)		CGF
		156	010	1415		2605			(48,167)		SMH Grant
		156	010	1415		7601			(337)		CGF
		100	045	7410		6602			4,628		Svc. Reimb. F/S to CGF

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 TOTAL REVENUE CHANGE ////////////////////////////////////// 670,474 TOTAL REVENUE CHANGE



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN SERVICES
SOCIAL AND FAMILY SERVICES DIVISION
ADMINISTRATIVE OFFICES
426 S.W. STARK ST., 6TH FLOOR
PORTLAND, OREGON 97204
(503) 248-3691

BOARD OF COUNTY COMMISSIONERS
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POLLY CASTERLINE • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Gladys McCoy
Multnomah County Chair

VIA: Duane Zussy *Duane Zussy (MC)*
Director, Department of Human Services

FROM: Gary Smith *GS*
Director, Social Services Division

DATE: September 1, 1989

SUBJECT: Recommendation to Approve Amendment #4 to the State Mental Health Grant and the Accompanying Budget Modification 0H5#5

RECOMMENDATION: Social Services Division recommends Chair approval of Amendment #4 to the State Mental Health Division and Board approval of the accompanying budget modification, 0H5#5.

ANALYSIS: Amendment #4 implements the legislatively-approved 4% cost of living adjustment for mental health services for the 1989-90 fiscal year. The majority of these increases occur in direct services and have already been subcontracted out. The net increases for this year is \$1,256,340 which brings our grant total to \$26,503,021 for the first half of the biennium.

Also included in this amendment are adjustments within the alcohol and drug section as requested by County and additional revenue for DD Early Intervention and Residential Services.

Revenue from this amendment was compared to the Division's adopted budget and the difference was allocated in the appropriate program budgets.

BACKGROUND: When the Division's budgets were prepared early last spring, we included the anticipated 4% COLA and budgeted accordingly. This increase was passed on to our subcontract providers in their FY 89/90 subcontract agreements. Due to significant changes in program funding from last spring to now, the state contract and our budget need to be adjusted to match. As a result, several program budgets are reduced. These reduction will be made up pending additional State contract amendments to correct underfunded services.

Local Administration revenue is not allocated at this time and will be appropriated at a future date when program funding needs have been prioritized. DD Case Management COLA was delayed and will be received in an upcoming amendment.

BUDGET MODIFICATION NO. DHS #7

(For Clerk's Use) Meeting Date 9/21/89
Agenda No. B-4

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date)
DEPARTMENT Human Services DIVISION Social Services
CONTACT Susan Clark TELEPHONE 248-3691
*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Duane Zussy

SUGGESTED
AGENDA TITLE (to assist in preparing a description for the printed agenda)

Budget Modification DHS # 7 appropriates \$4,000 of Local 2145 (beer and wine tax) revenue for A&D prevention conference scholarships and related trainings.

(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

[] PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET

Budget modification DHS # 7 requests Board approval to appropriate \$4,000 in Local 2145 revenue in the A&D operations budget. \$3,500 will be used to fund approximately 10 prevention conference scholarships for low income and/or minority individuals. The remaining \$500 is appropriated for food and beverages for a 3-day training for community leaders and agency representatives from north and northeast Portland.

Revenue for this budget modification is currently unallocated revenue in the A&D contracts revenue receipts.

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)

No impact. This bud mod is appropriating unallocated revenue currently in A&D contracts revenue receipts.

CGF increased by \$276.

Service reimbursement F/S to CGF increased by \$276.

4. CONTINGENCY STATUS (to be completed by Finance/Budget)

Contingency before this modification (as of _____) \$ _____
(Specify Fund) (Date)
After this modification \$ _____

Originated By _____ Date 8/30/89 Department Manager _____ Date 9/7/89
Budget Analyst _____ Personnel Analyst _____

Board Approval _____ Date _____
Carrie A. Parkerson 9-21-89

EXPENDITURE

TRANSACTION EB []

GM []

TRANSACTION DATE _____

ACCOUNTING PERIOD _____

BUDGET FY _____

Document Number	Action	Fund	Agency	Organ- zation	Reporting Activity Category	Object	Current Amount	Revised Amount	Change Increase (Decrease)	Sub- Total	Description
		156	010	1410		6270			500		Increase Food
		156	010	1410		6310			3,500		Increase Educ. and Train.
		156	010	1410		7100			276		Increase Indirect (.069)
										4276	Total Org. 1410
		100	010	0104		7608			276	276	Cash Transfer

//////////////////////////////////////
 TOTAL EXPENDITURE CHANGE //////////////////////////////////////// 4,552 TOTAL EXPENDITURE CHANGE

REVENUE

TRANSACTION RB []

GM []

TRANSACTION DATE _____

ACCOUNTING PERIOD _____

BUDGET FY _____

Document Number	Action	Fund	Agency	Organ- zation	Reporting Activity Category	Revenue Source	Current Amount	Revised Amount	Change Increase (Decrease)	Sub- Total	Description
		156	010	1410		2389			4,000		Local 2145
		156	010	1410		7601			276		CGF
		156	045	7410		6602			276		Svc. Reimb. F/S to CGF

//////////////////////////////////////
 TOTAL REVENUE CHANGE //////////////////////////////////////// 4,552 TOTAL REVENUE CHANGE

4246B



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN SERVICES
SOCIAL AND FAMILY SERVICES DIVISION
ADMINISTRATIVE OFFICES
426 S.W. STARK ST., 6TH FLOOR
PORTLAND, OREGON 97204
(503) 248-3691

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY • CHAIR OF THE BOARD
PAULINE ANDERSON • DISTRICT 1 COMMISSIONER
GRETCHEN KAFOURY • DISTRICT 2 COMMISSIONER
RICK BAUMAN • DISTRICT 3 COMMISSIONER
POLLY CASTERLINE • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Gladys McCoy
Multnomah County Chair

VIA: Duane Zussy *Duane Zussy*
Director, Department of Human Services

FROM: Gary Smith *GS*
Director, Social Services Division

DATE: August 31, 1989

SUBJECT: Recommendation to Approve Budget Modification DHS # 7

RECOMMENDATION: Social Services Division recommends Board approval of budget modification DHS # 7.

ANALYSIS: Budget modification DHS # 7 requests Board approval to allocate \$4,000 of Local 2145 (Beer and Wine Tax) revenue into the A&D Operations budget. \$3,500 will be appropriated to provide approximately 10 low income and/or minority scholarship opportunities to attend the Oregon A&D Prevention Conference in October. The remaining \$500 will be appropriated in food to cover refreshment costs for a three day workshop for community leaders and agency representatives from North and Northeast Portland, including the Columbia Villa Project.

Revenue for this amendment is currently unallocated revenue in the A&D contracts revenue receipts and can only be used for alcohol and drug related activities.

BACKGROUND: In order to increase involvement of minority communities in alcohol and drug prevention activities, the Alcohol and Drug Program Office would like to offer scholarship opportunities to attend the 6th Annual Prevention Conference in October. If approved, the program will solicit requests from the community for documented need for financial assistance to attend this conference. It is proposed that scholarships will be awarded to 2 african americans, 2 native americans, 2 hispanics, 2 asians and 2 low income individuals.

2jc



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN SERVICES
SOCIAL AND FAMILY SERVICES DIVISION
ALCOHOL AND DRUG PROGRAM OFFICE
426 S.W. STARK ST., 6TH FLOOR
PORTLAND, OREGON 97204
(503) 248-3696

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY • CHAIR OF THE BOARD
PAULINE ANDERSON • DISTRICT 1 COMMISSIONER
GRETCHEN KAFOURY • DISTRICT 2 COMMISSIONER
RICK BAUMAN • DISTRICT 3 COMMISSIONER
POLLY CASTERLINE • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Gary Smith
FROM: Norma Jaeger *NJ*
DATE: August 8, 1989
SUBJECT: Minority Scholarships for Prevention Conference

In order to augment involvement of minority communities in alcohol and drug prevention efforts, we see a need to offer scholarships to the Sixth Annual Prevention Conference in October 1989 (see attached). An estimated \$340 per person would be needed to cover registration, lodging, meals, and mileage for the four-day conference. Our goal is to recruit ten people to attend who are financially unable to do so.

The A/D Program anticipates unexpended 2145 funds this fiscal year and, therefore, requests a budget modification of \$3,500 from that account to be used for their scholarships.

In order to assure adequate, timely recruitment and attention to internal accounting requirements, the budget modification (if agreed upon by you) needs to be processed as soon as possible.

The scholarship amount has been "costed out" and we will provide those details in the modification narrative.

Please let me know if this meets with your approval so that we can expedite docketing the matter to the Board and, if approved at that level, begin recruitment.

Thank you.

[8988S-w]

BUDGET MODIFICATION NO. DHS#8

(For Clerk's Use) Meeting Date 9/21/89
Agenda No. R-5

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date)
DEPARTMENT Human Services DIVISION Social Services
CONTACT Susan Clark TELEPHONE 248-3691
*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Duane Zussy

SUGGESTED

AGENDA TITLE (to assist in preparing a description for the printed agenda)

Budget Modification DHS # 8 increases MED Children's Clinical Services by a total of \$68,083 from Amendment #5 to the State Mental Health Grant.

(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

[x] PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET

Budget modification DHS # 8 requests Board approval to increase the MED Children's Clinical Services budget a net total of \$68,083 for FY 89/90 to reflect Robert Wood Johnson Foundation revenue awarded via Amendment #5 to the State Mental Health Grant.

This revenue will be used to support a total of 3 FTE by 6/30/90 and associated M&S to plan for a Children's Mental Health Partners Project. (Maximum actual indirect allowed is \$2,446. The remainder will be made up by CGF.)

Note: The \$85,944 which appears in Amendment #5 reflects a 12-month allocation based on a 9/1/89-8/31/90 project date. The remaining \$17,861 will be carried over appropriated in FY 90/91 budget.

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)

State Mental Health Grant increased by \$68,083.

CGF increased by \$1,939 (indirect).

Service reimbursement F/S to CGF \$1,939.

Service reimbursement F/S to Insurance \$5,383.

Service reimbursement F/S telephone \$2,088.

4. CONTINGENCY STATUS (to be completed by Finance/Budget)

_____ Contingency before this modification (as of _____) \$ _____
(Specify Fund) (Date)
After this modification \$ _____

Originated By <u>Susan Clark</u>	Date <u>8/31/89</u>	Department Manager <u>Duane Zussy (w)</u>	Date <u>9/7/89</u>
Budget Analyst	Date	Personnel Analyst <u>Gerald W. Bittle</u>	Date <u>9-7-89</u>
Board Approval <u>Cassie A. Parkerson</u>	Date <u>9-21-89</u>	Date	

PERSONNEL DETAIL FOR BUD MOD NO. DHS # 8

5. ANNUALIZED PERSONNEL CHANGES (Compute on a full year basis even though this action affects only a part of the fiscal year.)

FTE Increase (Decrease)	POSITION TITLE	A n n u a l i z e d			
		BASE PAY Increase (Decrease)	FRINGE Increase (Decrease)	INSURANCE Increase (Decrease)	TOTAL Increase (Decrease)
1.0	Project Coordinator (HSS)	\$33,846	\$8,550	\$4,053	\$46,449
1.0	Clinical Supervisor (HSS)	\$33,846	\$8,550	\$4,053	\$46,449
1.0	Program Development Tech	\$19,980	\$5,047	\$3,333	\$28,360
TOTAL CHANGE (ANNUALIZED)		\$87,672	\$22,147	\$11,439	\$121,258

6. CURRENT YEAR PERSONNEL DOLLAR CHANGES (calculate costs or savings that will take place within this fiscal year; these should explain the actual dollar amounts being changed by this Bud Mod.)

Full Time Positions, Part-Time, Overtime, or Premium	Explanation of Change	C u r r e n t F Y			
		BASE PAY Increase (Decrease)	FRINGE Increase (Decrease)	INSURANCE Increase (Decrease)	TOTAL Increase (Decrease)
Full-time (10 months) (.83 FTE)	Project Coordinator	\$28,205	\$7,125	\$3,378	\$38,708
Full-time (1 month) (.08 FTE)	Clinical Supervisor	\$2,821	\$713	\$338	\$3,872
Full-time (6 months) (.5 FTE)	Program Development Tech.	\$9,990	\$2,524	\$1,667	\$14,181
		\$41,016	\$10,362	\$5,383	\$56,761



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN SERVICES
SOCIAL AND FAMILY SERVICES DIVISION
ADMINISTRATIVE OFFICES
426 S.W. STARK ST., 6TH FLOOR
PORTLAND, OREGON 97204
(503) 248-3691

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY • CHAIR OF THE BOARD
PAULINE ANDERSON • DISTRICT 1 COMMISSIONER
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POLLY CASTERLINE • DISTRICT 4 COMMISSIONER

MEMORANDUM

TO: Gladys McCoy
Multnomah County Chair

VIA: Duane Zussy *Duane Zussy*
Director, Department of Human Services

FROM: Gary Smith *GS*
Director, Social Services Division

DATE: August 31, 1989

SUBJECT: Recommendation to Approve Amendment #5 to the State Mental Health Grant and the Accompanying Budget Modification *DH5#8*

RECOMMENDATION: Social Services Division recommends Chair approval of Amendment #5 to the State Mental Health Division and Board approval of the accompanying budget modification. *DH5#8*

ANALYSIS: Amendment #5 increases MED Children's Services by \$85,944 to enable the County to plan and prepare for implementation of Multnomah County's Children's Mental Health Partnership Program, a project to demonstrate measures to reduce the need for long-term hospitalization and residential care for children with severe mental or emotional disabilities. Funding for this amendment was awarded by the Robert Wood Johnson Foundation via the State Mental Health Division and may be extended for three years, based on work done this first year. The revenue will be used to hire three project staff.

Revenue from this amendment is appropriated in the MED Children's Clinical Services budget via the accompanying budget modification.

BACKGROUND: Receipt of this grant is a result of over one year of cooperative planning and grant preparation between the State and the County. At this point, Multnomah County has received only the first year of funding--the planning phase. Recruitment for the project director is currently under way with an anticipated hire date in September. Two project staff will be hired later on in the planning phase.

3jc

9/7/89

Meeting Date 9/21/89
Agenda No. R-6

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Approval of Notice of Grant Award and
Accompanying Budget Modification

9/21/89
(Date)

Informal Only* _____
(Date)

Formal Only _____
(Date)

DEPARTMENT Human Services DIVISION Aging Services Division

CONTACT Marie Eighmey TELEPHONE 248-3646

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD Duane Zussy/James McConnell

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

The federal Department of Health and Human Services has extended the Linking Networks grant award through September 30, 1989. The remaining \$33,607 funds the final phase of the project. This includes the writing of the final report on Aging Services Division's Multnomah County Pilot Project and the writing of a monograph on all five demonstration projects (Mult.County; Des Moines, IA; Bridgeport, CT; Onancock, VA; and the Rhode Island Department of Elder Affairs.)

Submit simultaneously w/ DHS Bud Mod #10
(IF ADDITIONAL SPACE IS NEEDED, PLEASE USE REVERSE SIDE)

ACTION REQUESTED:

- INFORMATION ONLY
- PRELIMINARY APPROVAL
- POLICY DIRECTION
- APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA _____

IMPACT:

PERSONNEL

- FISCAL/BUDGETARY
- General Fund

Other: _____

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: Duane Zussy (w/)

BUDGET / PERSONNEL Thomas S. Egan | Susan Daniel

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) [Signature]

OTHER _____
(Purchasing, Facilities Management, etc.)

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

BUDGET MODIFICATION NO. DHS #10

(For Clerk's Use) Meeting Date _____
Agenda No. _____

1. REQUEST FOR PLACEMENT ON THE AGENDA FOR _____ (Date)

DEPARTMENT Human Services DIVISION Aging Services
CONTACT Marie Eighmey TELEPHONE 248-3646
*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD Duane Zussy/James McConnell

SUGGESTED
AGENDA TITLE (to assist in preparing a description for the printed agenda)
DHS Budget Modification # 10, to increase Aging Services Division's budget by \$33,607 Linking Networks grant to support the extension of the program through September 30, 1989.
(Estimated Time Needed on the Agenda)

2. DESCRIPTION OF MODIFICATION (Explain the changes this Bud Mod makes. What budget does it increase? What do the changes accomplish? Where does the money come from? What budget is reduced? Attach additional information if you need more space.)

PERSONNEL CHANGES ARE SHOWN IN DETAIL ON THE ATTACHED SHEET
This budget modification adds \$33,607 Linking Networks grant funds carried forward from FY88-89 but not included in the Adopted Budget to fund the final phase of the Linking Networks Project. This phase includes the writing of the final report on Aging Services Division's Multnomah pilot project and the writing of a monograph on all five demonstration projects (Multnomah County; Des Moines, IA; Bridgeport, CT; Onancock, VA; Rhode Island Dep. of Elder Affairs.)
The grant dollars pay for temporary staff and supporting material/services for this final phase.
This budget modification supports the grant extension awarded by Department of Health and Human Services Area on Aging.

3. REVENUE IMPACT (Explain revenues being changed and the reason for the change)

Federal Grant Revenue Summary

Original Grant Budget:	\$150,000
FY87-88:	(33,534)
FY88-89:	(82,859)
Carryover to FY89-90:	\$ 33,607 + \$0 in Adopted Budget = \$33,607 Revised Budget

4. CONTINGENCY STATUS (to be completed by Finance/Budget)

Contingency before this modification (as of _____)	\$ _____
(Specify Fund) _____ (Date) _____	
After this modification	\$ _____

Originated By <u>James McConnell</u>	Date <u>9-5-89</u>	Department Director <u>Duane Zussy (DC)</u>	Date <u>9/6/89</u>
Finance/Budget <u>Thomas D. Soper</u>	Date <u>9-7-89</u>	Employee Relations	Date
Board Approval <u>Carrie A. Puckerson</u>	Date <u>9-21-89</u>		Date

EXPENDITURE TRANSACTION EB []

GM [] TRANSACTION DATE _____ ACCOUNTING PERIOD _____ BUDGET FY _____

Document Number	Action Fund	Agency	Organization	Activity	Reporting Category	Object	Current Amount	Revised Amount	Change Increase (Decrease)	Sub-Total	Description
		156	010	1710		1721 5200			10,914		Increase Temporary
		"	"	"		" 5500			2,757		Increase Fringe
		"	"	"		" 5550			769		Increase Insurance
										14,440	Increase Personal Svcs.
		"	"	"		" 6060			11,880		Increase Pass Thru
		"	"	"		" 6120			2,500		Increase Printing
		"	"	"		" 6200			1,000		Increase Postage
		"	"	"		" 6230			1,157		Increase Supplies
		"	"	"		" 6310			850		Increase Education/Travel
		"	"	"		" 7100			1,480		Increase Indirect Cost
		"	"	"		" 7150			300		Increase Telephone
										19,167	Increase Mats/Svcs.
TOTAL EXPENDITURE CHANGE									\$33,607	TOTAL EXPENDITURE CHANGE	

REVENUE TRANSACTION RB []

GM [] TRANSACTION DATE _____ ACCOUNTING PERIOD _____ BUDGET FY _____

Document Number	Action Fund	Agency	Organization	Activity	Reporting Category	Revenue Source	Current Amount	Revised Amount	Change Increase (Decrease)	Sub-Total	Description
		156	010	1710		2067			\$33,607		Linking Networks Grant
TOTAL REVENUE CHANGE										TOTAL REVENUE CHANGE	

PERSONNEL DETAIL FOR BUD MOD NO. DHS #10

5. ANNUALIZED PERSONNEL CHANGES (Compute on a full year basis even though this action affects only a part of the fiscal year.)

FTE Increase (Decrease)	POSITION TITLE	Annualized		
		BASE PAY Increase (Decrease)	FRINGE Increase (Decrease)	TOTAL Increase (Decrease)
	NOT APPLICABLE			
	TOTAL CHANGE (ANNUALIZED)			

6. CURRENT YEAR PERSONNEL DOLLAR CHANGES (calculate costs or savings that will take place within this fiscal year; these should explain the actual dollar amounts being changed by this Bud Mod.)

Full Time Positions, Part-Time, Overtime, or Premium	Explanation of Change	Current FY		
		BASE PAY Increase (Decrease)	FRINGE Increase (Decrease)	TOTAL Increase (Decrease)
N/A	ORG 1710 - Central Admin. Temporary Prgm. Supervisor With Benefits: Base: 680 hrs x \$16.05 Fringe: \$324.34 x 8.5 pay pds. Ins: \$90.50 x 8.5 pay pds.	\$10,914 \$10,914	FRG INS 2,757 769 2,757 769	\$14,440 \$14,440

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Office of Human Development Services
FINANCIAL ASSISTANCE AWARD

SAI NUMBER:
PMS DOCUMENT NUMBER:
0190AM027501

1. AWARDING OFFICE: AOA-MODEL PROJECT		2. ASSISTANCE TYPE: GRANT		3. AWARD NO: 90AM0275/01		4. AMEND. NO.: 4	
5. TYPE OF AWARD: DEMONSTRATION			6. TYPE OF ACTION: REVISION (*)			7. AWARD AUTHORITY: 42 USC 3031-3037B	
8. BUDGET PERIOD: 09/01/87 THRU 09/30/89				9. PROJECT PERIOD: 09/01/87 THRU 09/30/89		10. CAT. NO.: 13.668	

11. RECIPIENT ORGANIZATION: MULTNOMAH COUNTY DEPARTMENT OF HUMAN SERVICES AGING SERVICES DIVISION 426 S.W. STARK, 5TH FLOOR PORTLAND OR 97204 BETSY SKLOOT, DEPARTMENT DIRECTOR		12. PROJECT/PROGRAM TITLE: PRIORITY AREA 1.3B-LINKING NETWORKS PROJECT OF THE LIVING AT HOME COALITION	
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	-----------------------------------------------------------------------------------------------------------------	--

13. COUNTY: MULTNOMAH	14. CONGR. DIST.: 3	15. PRINCIPAL INVESTIGATOR OR PROGRAM DIRECTOR: JIM MCCONNELL
--------------------------	------------------------	------------------------------------------------------------------

16. APPROVED BUDGET:		17. AWARD COMPUTATION:	
PERSONNEL	\$ 81,740	A. NON-FEDERAL SHARE	\$ 140,255 48.3
FRINGE BENEFITS	25,199	B. FEDERAL SHARE	\$ 150,000 51.7
TRAVEL	3,200	18. FEDERAL SHARE COMPUTATION:	
EQUIPMENT	2,000	A. TOTAL FEDERAL SHARE	\$ 150,000
SUPPLIES	19,727	B. UNOBLIGATED BALANCE FEDERAL SHARE	\$ 0
CONTRACTUAL	0	C. FED. SHARE AWARDED THIS BUDGET PERIOD	\$ 150,000
OTHER	148,257	19. AMOUNT AWARDED THIS ACTION: \$ - 0 -	
TOTAL DIRECT COSTS	280,123	20. FEDERAL \$ AWARDED THIS PROJECT PERIOD:	
TOTAL INDIRECT COSTS CALCULATED AT % OF \$	10,132	21. AUTHORIZED TREATMENT OF PROGRAM INCOME: ADDITIONAL COSTS	
TOTAL IN-KIND CONTRIBUTIONS	0	22. APPLICANT EIN:	23. PAYEE EIN:
TOTAL APPROVED BUDGET \$	290,255	1936002309A7	24. OBJECT CLASS: 41.45

25. FINANCIAL INFORMATION:								
ORGN	FED %	YR SUPT	PROG	APPROPRIATION	CAN NO.	NEW AMT.	UNOBLIG.	NONFED %

26. REMARKS:
PAY CODE 1 - PAID BY THE DHHS PMS, SEE REVERSE FOR PAYMENT INFO.
ALL PREVIOUS TERMS AND CONDITIONS REMAIN IN EFFECT.
*THIS ACTION APPROVES GRANTEE'S REQUEST OF JUNE 29, 1989 TO REVISE THE CURRENT BUDGET.

27. SIGNATURE - HDS GRANTS OFFICER <i>Margaret A. Tolson</i> MARGARET A. TOLSON	DATE: 7-28-89	28. SIGNATURE(S) CERTIFYING FUND AVAILABILITY <i>N/A</i>	DATE:
29. SIGNATURE AND TITLE - PROGRAM OFFICIAL(S) <i>DR. Joyce T. Berry</i> DR. JOYCE T. BERRY	DATE: 7/25/89	ACTING COMMISSIONER, AOA	



MULTNOMAH COUNTY OREGON

DEPARTMENT OF HUMAN SERVICES
AGING SERVICES DIVISION
ADMINISTRATIVE OFFICES
426 S.W. STARK, 5TH FLOOR
PORTLAND, OREGON 97204
(503) 248-3646

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

TO: Gladys McCoy, Chair
Board of County Commissioners

VIA: Duane Zussy, Director *Duane Zussy (w)*
Department of Human Services

FROM: James McConnell, Director *James McConnell*
Aging Services Division

DATE: September 5, 1989

SUBJECT: APPROVAL OF LINKING NETWORK PROJECT GRANT AWARD EXTENSION &
ACCOMPANYING BUDGET MODIFICATION

RETROACTIVE STATUS: Request for approval of this grant award extension and its accompanying budget modification was delayed because the grant extension document was not received prior to July 1 and the dollars available to fund the extension were not known until FY88-89 year-end closure.

RECOMMENDATION: The Aging Services Division recommends County Chair acceptance of the Linking Network Project grant award extension from the federal Department of Health and Human Services for the period of July 1, 1989 through September 30, 1989. The Division also recommends County Board approval of the accompanying budget modification, which adds Linking Network Project grant funds to the FY89-90 budget.

ANALYSIS: The federal Department of Health and Human Services has extended the Linking Networks Project grant award through the first quarter of FY89-90. The \$33,607 remaining grant monies will fund the final phase of the project. This phase includes the writing and distribution of the final report on Aging Services Division's Multnomah County pilot project and the writing of a monograph on all five demonstration projects throughout the nation (Mult. County; Des Moines, IA; Bridgeport, CT; Onancock, VA; and the Rhode Island Dept of Elder Affairs). The grant money will pay for temporary staff and materials/supplies support for this last phase completion.

BACKGROUND: The Linking Networks Project began in FY87-88 with a total \$150,000 grant funds to establish a network of services for the elderly who appear at the emergency rooms of hospitals and need other than medical

assistance. Of the total grant, \$33,534 was expended in FY87-88 and \$82,859 in FY89-90, leaving \$33,607 to complete the project. The grant covers Indirect Cost expense. County G/F dollars are not affected by this award.

[INPZSMEM]

DATE SUBMITTED _____

(For Clerk's Use)
Meeting Date 9/21/89
Agenda No. R-7

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: LIQUOR LICENSE

Informal Only* _____
(Date)

Formal Only 9-21-89
(Date)

DEPARTMENT Sheriff's Office DIVISION _____

CONTACT Sgt. Ed Hausafus TELEPHONE 255-3600

*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Bill Vandever

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

Application for a PACKAGE STORE (new outlet) license for the Jackpot Food Mart, 28210 SE Orient Drive; applicants Donald L. and Marjorie N. Williams with recommendation for approval.

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

ACTION REQUESTED:

- INFORMATION ONLY
- PRELIMINARY APPROVAL
- POLICY DIRECTION
- APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA CONSENT AGENDA

IMPACT:

PERSONNEL

FISCAL/BUDGETARY

General Fund

Other _____

1989 SEP 12 PM 2:24
CLERK OF COUNTY
OREGON

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: Robert G. Shippen/wmv

BUDGET / PERSONNEL _____

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

OTHER _____
(Purchasing, Facilities Management, etc.)

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

PLICATION

STATE OF OREGON
OREGON LIQUOR CONTROL COMMISSION

Return To:

pd 25.
3495
2014

GENERAL INFORMATION

No. 21183

Application form costs \$5.00. A non-refundable processing fee is assessed when you submit this completed form to the Commission (not for Druggist and Health Care Facility Licenses). The filing of this application does not commit the Commission to the granting of a license for which you are applying nor does it permit you to operate the business named below.

(THIS SPACE IS FOR OLCC OFFICE USE)

(THIS SPACE IS FOR CITY OR COUNTY USE)

Application is being made for:

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

APPLICATION RECEIVED
OREGON LIQUOR CONTROL COMMISSION

AUG 6 1989
2014
LICENSE DIVISION

OTHER: _____

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

THE CITY COUNCIL, COUNTY COMMISSION, OR COUNTY

COURT OF Multnomah County
(Name of City or County)

RECOMMENDS THAT THIS LICENSE BE: GRANTED DENIED _____

DATE 9-21-89

BY Philip McKey
(Signature)

TITLE Chair

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

1. Name of Corporation, Partnership, or Individual Applicants:

- 1) DONALD L. WILLIAMS
- 2) MARJORIE M. WILLIAMS
- 3) _____
- 4) _____
- 5) _____
- 6) _____

(EACH PERSON LISTED ABOVE MUST FILE AN INDIVIDUAL HISTORY AND A FINANCIAL STATEMENT)

2. Present Trade Name JACKROT FOODMART

3. New Trade Name _____ Year filed _____ with Corporation Commissioner

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

5. Business mailing address P.O. BOX 354 BORING OR 97009
(P.O. Box, Number, Street, Rural Route) (City) (State) (Zip)

6. Was premises previously licensed by OLCC? Yes _____ No Year _____

7. If yes, to whom: _____ Type of license: _____

8. Will you have a manager: Yes _____ No Name _____
(Manager must fill out Individual History)

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

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

11. OLCC representative making investigation may contact: DON WILLIAMS
(Name)
39801 SE KITZMILLER RD, EAGLE CREEK 663-7904
(Address) (Tel. No. - home, business, message)

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

DATE 7-24-89

Applicant(s) Signature
(In case of corporation, duly authorized officer thereof)

- 1) [Signature]
- 2) Marjorie M Williams
- 3) _____
- 4) _____
- 5) _____
- 6) _____

Original -
Local Government

Zoning - OK per Sharon



Multnomah County Sheriff's Office

12240 N.E. GLISAN ST., PORTLAND, OREGON 97230

ROBERT G. SKIPPER
SHERIFF

(503) 255-3600

MEMORANDUM

TO: BOARD OF COUNTY COMMISSIONERS

FROM: ROBERT G. SKIPPER
Sheriff

DATE: September 6, 1989

SUBJECT: LIQUOR LICENSE APPLICATION

Attached is the Package Store (new outlet) liquor license application for the Jackpot Food Mart 28210 SE Orient Drive, Gresham, Oregon 97080. The applicant(s) Donald L. and Marjorie N. Williams have no criminal record and I recommend that the application be approved.

EH/slr/28-AINT

Attachment

①

Date 9-21-89

NAME

Herb Brown

ADDRESS

1546 SE 138 Ave.

Street

Portland 97233

City

Zip

I wish to speak on Agenda Item #
Subject

R-8 & R-9

____ FOR

____ AGAINST

8 - Prosis

9 - Against

Date 7-21-89

② NAME

Frank Leachart

ADDRESS

2103 NE 24th Ct

Street

Dresham Or 97030

City

Zip

I wish to speak on Agenda Item # R-9 & R-8

Subject Revised PHD

R-8 ✓

FOR

R-9 ✓

AGAINST

8-

9-

3

9-21-89
Date _____

NAME

Jeanne Orcutt

ADDRESS

4201 N.W. 3rd St

Street

Cresham, CR 97030

City

Zip

I wish to speak on Agenda Item #

R-849

Subject

RKWD PUO

____ FOR

____ AGAINST

8 -

9 - would not get your hearing

Date 9/21/89

NAME

Emmie Jensen

ADDRESS

2911 S.E. 174

Street

Portland Ore

City

97236

Zip

I wish to speak on Agenda Item #

R-549

Subject

 FOR

 X AGAINST

8 +

9 -

5

Date 9-21-89

NAME

Pearl Hood

ADDRESS

2134 SE 174

Street

Portland

City

97233

Zip

I wish to speak on Agenda Item #

R. 8 & 9

Subject

Rockwood PUD

 FOR

 X AGAINST

8.

9- agent.

6

Date 9-27-89

NAME

Clare Donison

ADDRESS

28027 SE Orient Drive

Street

Gresham

City

97080

Zip

I wish to speak on Agenda Item #

Subject

Boundary Commission

8

FOR

9

AGAINST

8-yes

9-no

①

Date 9/21

NAME

BILL STALLINGS

ADDRESS

14606 SE HARRISON

Street

PORTLAND ORE 97233

City

Zip

R-9

I wish to speak on Agenda Item # _____

Subject

RW PUD

X FOR

____ AGAINST

②

Date 9-21

NAME

FRANK JASSOLSON

ADDRESS

53 SW Yamhill

Street
Portland

City

97204

Zip

I wish to speak on Agenda Item #

R-8 R-9

Subject

PUD

FOR R-8

AGAINST

R-9

9

Date 9/21

NAME

Leslie Roberts

ADDRESS

53 SW Yamhill

Street

Portland

City

97204

Zip

(FRANK Roberts daughter)

I wish to speak on Agenda Item #

R-8, R-9

Subject

PUD

X FOR

R-8

X AGAINST

R-9

10

Date 9/21/89

NAME

Mrs. Jessica M. Robert

ADDRESS

1333 W Eastman Pkwy.
Gresham OR 97030

I wish to speak on Agenda Item #

R9

Subject

~~Water~~ PUD

FOR

AGAINST

11

CASE No. R-9

Date: 9.21.89

HEARING SUBJECT Rockwood PVD

NAME Thomas Sporsler

ADDRESS 501 NE Hook
(Street Name and Number)

Gresham
(City)

In Favor

Opposed

12

Date 9-21-8

NAME

DIANE E. ROBINSON

ADDRESS

271 NE GINSENG

Street

ESTACADA, OR

97023

City

Zip

I wish to speak on Agenda Item #

R 829

Subject

 FOR

AGAINST

13

Date _____

NAME

Jack Adams

ADDRESS

17204 NE Halscy

Street

Portland

City

97204

Zip

I wish to speak on Agenda Item #

7

Subject _____

____ FOR

____ AGAINST

Date 9-21-89

NAME

Vaughn Longaneker

ADDRESS

17445 S.W. Washington Ct

Street

Beaverton, Or.

City

97007

Zip

I wish to speak on Agenda Item #

Subject Needle exchange

 FOR

 AGAINST

DATE SUBMITTED 9-12-89

(For Clerk's Use)
Meeting Date 9/21/89
Agenda No. R-8

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Costs for PUD Elections

Informal Only* _____
(Date)

Formal Only 9-21-89
(Date)

DEPARTMENT BCC

DIVISION Commissioner Anderson

CONTACT Bill Farver

TELEPHONE 3740

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD Larry Kressel

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

Providing instructions to the Elections Clerk not to require a "bond, cash deposit, or other security deposit" from the petitioners in a PUD proceeding under ORS 261.

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

ACTION REQUESTED:

- INFORMATION ONLY
- PRELIMINARY APPROVAL
- POLICY DIRECTION
- APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 15 minutes

IMPACT:

PERSONNEL

- FISCAL/BUDGETARY
- General Fund

Other _____

89-172
89-176

SIGNATURES:

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

BUDGET / PERSONNEL _____

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

OTHER _____
(Purchasing, Facilities Management, etc.)

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

September 12, 1989

To: Board of County Commissioners
From: Pauline Anderson
Re: PUD Resolution concerning Cost Recoupment

Larry Kressel's memo to us of August 11, 1989, raises the issue we dealt with two years ago concerning whether PUD petitioners should be required to post a bond or other security with the county clerk.

After our extensive discussion two years ago when we concluded that we should not ask petitioners to post costs, I asked my staff to prepare a resolution establishing that as county policy. In the inevitable crush of events, we did not file that resolution.

However, I am now interested in forwarding the resolution we prepared at that time. Because counsel will be bringing a related PUD resolution to the Board next week, I am submitting it now for your consideration. I am also including a revised memo Bill Farver did at that time discussing why we should adopt the resolution.

I hope this material is helpful.

0882A

September 12, 1989

To: Pauline
From: Bill
Re: PUD bond

ARGUMENTS FOR NOT REQUIRING A BOND FOR THE PUD ELECTION

1. Generally bad policy for an district or election to be burdened by the cost of election. Individuals should be free to exercise their rights of citizen government without worrying about the costs.

Lack of notice to the petitioners in this case. At the minimum, people should know up front whether they will be required to post a bond.

Finally, individuals that signed a petition have a legitimate expectation that the measure will get on the ballot if they gather sufficient signatures.

2. County could face a couple different constitutional claims if they wre to try and impose a bond.

Oregon statutes require petitions for forming special districts be accompanied by a bond, cash deposit, or other security". etc. ORS 198.775
ORS 261.210 (2) says that you may require this for a PUD.

This section may be constitutionally suspect.
Unlike other special districts, PUDS are authorized by the Oregon Constitution. Article XI sec. 12.
(this would be their Oregon constitutional claim)

Petitioners may also have an equal protection argument if you equate the right to vote with the right to petition the government for forming a PUD. (this would be their federal constitutional claim.)

3. County has another method to recoup the costs - small assessment on property owners in the affected districts. This is what was done in 1987.

This assessment can be seen as the cost of democracy and of having the privilege of exercising right to vote on this issue.

0882

BEFORE THE BOARD OF COUNTY COMMISSIONERS
OF MULTNOMAH COUNTY, OREGON

In the matter of Establishing) RESOLUTION
a Policy Governing the Recoup-)
ment of Costs for PUD Elections) 89-176

WHEREAS, as a general matter citizens should be able to exercise their political rights without being burdened by financial requirements.

WHEREAS, Article XI sec. 12 of the Oregon Constitution authorizes the establishment of Public Utility Districts.

WHEREAS, the County can recover the cost of elections on PUDs by taxing assessable property in the area where the election was held. ORS 261.210 (3)

THEREFORE, BE IT RESOLVED, that the Board of County Commissioners instruct the Elections Clerk not to require a "bond, cash deposit, or other security deposit" from the chief petitioners in a PUD proceeding under ORS 261.

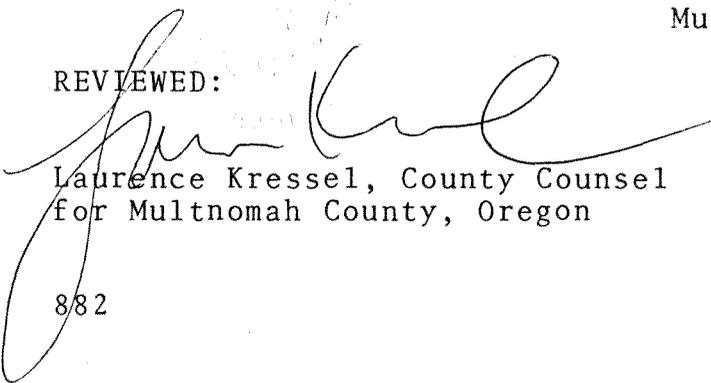
DATED this 21st day of September, 1989.

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY, OREGON

By


Gladys McCoy
Multnomah County Chair

REVIEWED:


Laurence Kressel, County Counsel
for Multnomah County, Oregon

DATE SUBMITTED _____

(For Clerk's Use)

Meeting Date 9/21/89

Agenda No. R-9

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Rockwood Water PUD

Informal Only* _____
(Date)

Formal Only September 21, 1989
(Date)

DEPARTMENT Nondepartmental DIVISION Board of Commissioners

CONTACT Larry Kressel TELEPHONE 3138

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD Larry Kressel

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

Resolution in the matter of the Petition for Formation of the Rockwood Water Peoples Utility District

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

ACTION REQUESTED:

INFORMATION ONLY PRELIMINARY APPROVAL POLICY DIRECTION APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA _____

IMPACT:

PERSONNEL

FISCAL/BUDGETARY

General Fund

Other _____

1989 SEP 21 PM 3:30
COUNTY CLERK
OREGON

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: Gladys McCray

BUDGET / PERSONNEL _____

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

OTHER _____
(Purchasing, Facilities Management, etc.)

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



MULTNOMAH COUNTY OREGON

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

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

NOTICE OF HEARING

The Multnomah County Board of Commissioners will hold a hearing on Thursday, September 21, 1989, at 9:30 AM in Room 602 of the Multnomah County Courthouse, 1021 SW Fourth, Portland, to consider a resolution in the matter of the petition for formation of the Rockwood Water Peoples Utility District.

Testimony will be taken from all persons wishing to testify.

For further information, contact Laurence Kressel, County Counsel, 248-3138.

MULTNOMAH COUNTY BOARD OF COMMISSIONERS

Jane McGarvin, Clerk of the Board

DIRECTIONS TO PETITION CIRCULATORS AND SIGNORS

Circulators:

A petition circulator must be an elector (registered voter) in Oregon.

Only one circulator may collect signatures on any one sheet of a petition.

The circulator of each sheet must complete the signature sheet affidavit at the bottom.

It is unlawful for you to knowingly make any false statement to any person who signs this petition or requests information about it.

Every petitioner must sign his or her own name. Under no circumstances may any person sign another person's name.

It is unlawful to circulate or file a petition, if you know it contains a false signature.

Signors:

You must be registered to vote and must live within the boundaries of the proposed district in order to validly sign this petition. SEE MAP ON THE ATTACHED PETITION.

Sign your name in full, as you wrote it when you registered to vote. Fill in the date signed, your residence, and your voter precinct number (if known). If your signature is hard to read, print your name on the same line.

A married woman should sign her own name, not her husband's name or his initials; for example: "Mary A. Jones"; not Mrs. John A. Jones".

Do not use ditto ("") marks.

It is unlawful to sign a petition more than once, to knowingly sign a petition when not qualified to do so, or to sign any other person's name. Do not sign another person's name under any circumstances.

Please collect signatures of registered voters and return no later than September 15, to:

THE ROCKWOOD WATER PEOPLES UTILITY DISTRICT CAMPAIGN

2134 SE 174th
Portland, OR. 97233

1546 SE 138th
Portland, OR. 97233

FOR INFORMATION, CALL: BILL STALLINGS, JEAN HOOD or HERB BROWN
255-6211 761-8865 255-6478

1993 AUG 31
 DIRECTOR OF ELECTIONS
 MULTNOMAH COUNTY

PETITION FOR FORMATION OF A SPECIAL PEOPLE'S UTILITY DISTRICT

CHIEF PETITIONERS

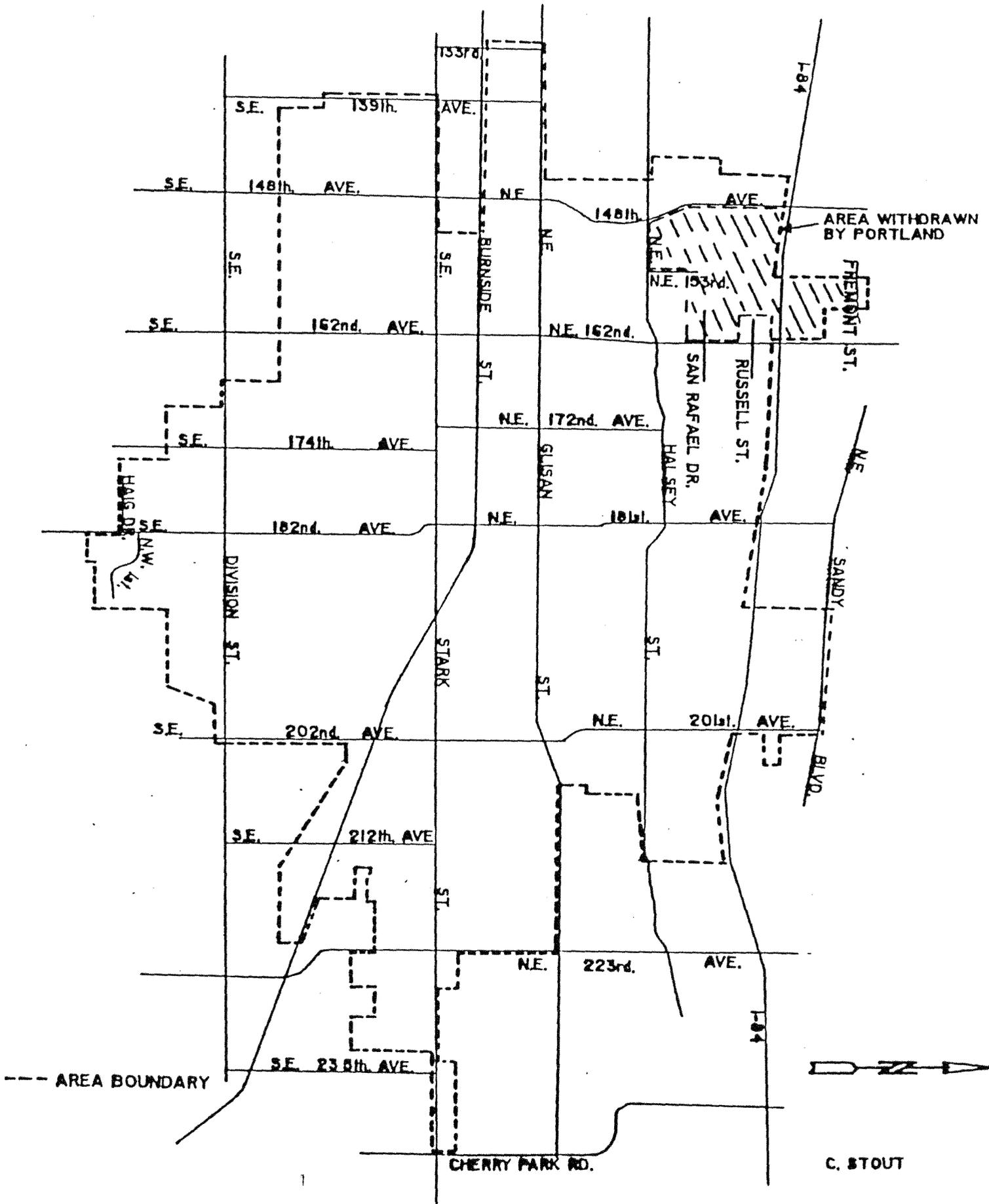
Bill Stallings 14606 S.E. Harrison St. Portland, OR 97233	Leo F. Effle 14153 E. Burnside Portland, OR 97233	Herb Brown 1546 S.E. 138th Portland, OR 97233
-----------------------------------------------------------------	---------------------------------------------------------	-----------------------------------------------------

TO THE COMMISSIONERS OF MULTNOMAH COUNTY:

We, the registered voters of the affected district, desire to form an incorporated PEOPLE'S UTILITY DISTRICT and request that the election be held on May 22, 1990 within the boundaries described below for the formation of such a district, to be created under the procedures set forth in ORS Chapter 261. The name by which the district is to be known is ROCKWOOD WATER PUD. It is hereby proposed that the ROCKWOOD WATER PUD, is formed, be authorized to impose a special levy of \$3,000 to finance the required engineer's report on revenue bonds for the acquisition or construction of the initial utility system, and to finance the election required under ORS 261.355(5) and (6).

In the event the people within any one or more municipalities or separate parcels of territory within the proposed district vote against its formation, then that portion of the district which voted in favor of the organization of the ROCKWOOD WATER PUD may be organized into the district.

DESCRIPTION OF BOUNDARIES



CLERK OF
COUNTY COMMISSIONERS

1989 SEP -1 PM 4: 20

MULTNOMAH COUNTY
OREGON

STATE OF OREGON

SS

COUNTY OF MULTNOMAH

THIS IS TO CERTIFY that the Rockwood Water People's Utility District petitions contain more than the required amount of valid signatures in the proposed People's Utility District. The validation of 792 signatures surpasses the necessary requirement of 587 signatures of registered voters in the proposed district.

WITNESS MY HAND and SEAL this 1st day of September, 1989.

VICKI K. ERVIN
DIRECTOR OF ELECTIONS
MULTNOMAH COUNTY

By:

Allen Robertson
Deputy



MULTNOMAH COUNTY OREGON

OFFICE OF COUNTY COUNSEL
1120 S.W. FIFTH AVENUE, SUITE 1530
PO. BOX 849
PORTLAND, OREGON 97207-0849
(503) 248-3138

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY, CHAIR
PAULINE ANDERSON
RICK BAUMAN
GRETCHEN KAFOURY

COUNTY COUNSEL
LAURENCE KRESSEL
CHIEF ASSISTANT
ARMINDA J. BROWN
ASSISTANTS
JOHN L. DU BAY
SANDRA N. DUFFY
J. MICHAEL DOYLE
H. H. LAZENBY, JR.
PAUL G. MACKAY
MARK B. WILLIAMS

M E M O R A N D U M

TO: Board of County Commissioners
Gladys McCoy, Chair
Pauline Anderson
Rick Bauman
Gretchen Kafoury
Sharron Kelley

FROM: Larry Kressel *LK*
County Counsel

DATE: September 14, 1989

RE: Rockwood Water Peoples Utility District
Formation Process

The Elections Director has certified the petition for formation of the Rockwood Water PUD. As I previously advised, state law gives the Board discretion whether to require a bond, cash deposit or other security deposit from the chief petitioners. ORS 261.210.

In this instance, the maximum amount of the bond, cash deposit or security deposit would be \$4,300. (The statutes set a maximum of \$100 per precinct and there are 43 precincts in the affected area.)

The Board's agenda for the September 21 meeting will include the security deposit issue. I have drafted two alternate resolutions; one requiring no security deposit (attachment A), the other requiring a deposit in an amount to be specified by the Board (attachment B).

I also understand that Commissioner Anderson plans to introduce a separate resolution stating that it is County policy to not require bonds, deposits or other security for PUD elections.

The remainder of this memorandum addresses the additional procedures for formation of this district. As you will note, the procedures have been clouded to a considerable degree by 1989 legislation.

The general guidelines for forming a PUD appear in ORS Chapter 261. The law requires the Board of Commissioners to conduct a public hearing not less than 60 nor more than 90 days after certification of the petition by the Elections Director. ORS 261.161. The hearing is for the purpose of determining the boundaries of the proposed district. Prior to the hearing, the Director of the State Department of Energy issues a report showing ". . . the availability and cost of power resources, potential tax consequences, and any other information considered by the director to be relevant to the proposed formation of the district." ORS 261.151. Once the Board of County Commissioners determines the boundaries for the PUD, it submits the question of district formation to the electors in the district. ORS 261.171.

Some of you may recall the foregoing procedures from your experience with the Pioneer PUD proposals last year. The statutes were sketchy and numerous questions arose (e.g. whether the measure could be included in the voters' pamphlet).

The 1989 legislature enacted a law that, in my view, considerably alters the process for forming the Rockwood Water PUD. The law relates to the jurisdiction of the Local Government Boundary Commission, an agency that previously had no role in the PUD formation process.

Section 10 of 1989 Oregon Laws Chapter 92 amends the definition of "district" for purposes of Boundary Commission jurisdiction. As amended, the Boundary Commission's jurisdiction includes "Corporations organized under ORS chapter 554 for the purpose of supplying water for domestic use or any other district supplying or seeking to supply domestic water" (underlined language is new). I read this new language to embrace a public utility district organized to supply domestic water (e.g., the proposed Rockwood Water PUD).

The Boundary Commission's entry into in the process for forming a PUD to supply domestic water is significant in several ways. First, it means the role of the County Commission is narrowed. Essentially, the county's role is limited to regulating the elections process (i.e., certification of the petition, scheduling and conducting the

election). Under the statutes, our duty is simply to transmit the certified petition to the Boundary Commission. ORS 199.476. (We do have the discretion to require a bond or other deposit of security to cover the cost of the election, as already noted.) If the Boundary Commission then adopts a final order approving the petition, the matter would be re-transmitted to the county for scheduling the election. ORS 199.480(1).

The transfer of jurisdiction to the Boundary Commission also has implications for parties interested in the proposal. Proponents of the Rockwood Water PUD will be required to prepare a feasibility analysis (ORS 199.476) and persuade the Boundary Commission that the proposal satisfies state criteria for district formation. See ORS 199.461 and 199.462. The Boundary Commission is authorized to approve district formation, modify the proposal or disapprove it, subject to judicial review. ORS 199.461(4).

The 1989 statutory change takes effect October 3, 1989. Although the petition was certified by the county Elections Director prior to that date (September 1, 1989), the County Commission could not take action under existing law to determine the boundaries until November (60 days after certification). See ORS 261.161. By that time, the Board would have been ousted of jurisdiction by 1989 Oregon Laws Chapter 92.

Although the case law is not definitive when it comes to deciding whether a new statutory procedure applies to a pending application to form a PUD, my reading is that the 1989 change would apply to the Rockwood proposal. I do not believe that mere certification of the petition by the Elections Director "vests" the petitioners with the right to proceed as though the County Commission still had authority to determine district boundaries after October 3.

Certification of the petition is only the first step in the process of government action on a PUD. That initial step is required whether a district proposal is exclusively under county jurisdiction (ORS Chapter 261) or is subject to Boundary Commission review (ORS Chapter 199). In either case, the county first certifies that sufficient signatures have been obtained.

Oregon law includes numerous cases involving disputes over whether a new law applies to a given factual situation. The

cases do not yield a single rule or test that is easily applicable. My reading of the cases results in these points: (1) the first inquiry is whether the legislature indicated an intent to apply the new law to the present type of situation; (2) if no legislative intent can be discerned, the new law will not be applied if to do so would be unfair. Unfairness is often phrased in terms of whether applying the new law would impair existing rights, create new obligations or impose more duties with respect to past transactions. See, e.g., Drainage District No. 7 v. Bernards, 89 Or. 531, 555-56, 174 P.2d 1167 (1918); Joseph v. Lowery, 261 Or. 545, 550-52, 495 P.2d 273 (1972).

Legislative intent in this instance is hard to discern. The 1989 law expanding Boundary Commission jurisdiction makes no reference to PUD petitions "in the pipeline."

I do not believe that applying the new statute to the pending proposal would be unfair, a hardship or would impair existing rights as those concepts are used in the applicable case law. As noted, the Rockwood application is only at the initial (certification) stage. Certification would be required by the county under either the "old" law (ORS Chapter 261) or the new one (ORS Chapter 199). Although proponents of the PUD may assert "rights" in the comparatively simpler process under ORS Chapter 261, others having interests in the matter can equally assert "rights" in the more comprehensive review contemplated under the Boundary Commission statutes.

Based on the foregoing, it is my recommendation that at the hearing on September 21, the Board direct that the petition to form the Rockwood Water PUD be transmitted to the Metropolitan Area Local Government Boundary Commission. I have included language to that effect in both resolutions referred to above.

Please note that I will be out of town until Wednesday, September 20. If questions about this matter arise before then, you may contact Chief Assistant County Counsel John DuBay.

5848R/dp

cc: Clerk of the Board
Chief Petitioners, Rockwood Water PUD
Vicki Ervin, Elections Director
Michael Huston, Assistant Attorney General
Thomas Sponsler, Gresham City Attorney
Frank Josselson, Esq.

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

In the Matter of Determining That)
No Bond, Cash Deposit or Other)
Security Shall Be Required as)
Security For the Election on the) RESOLUTION
Rockwood Water PUD, and Directing)
the Elections Director to Transmit)
the Petition to the Local)
Government Boundary Commission)

WHEREAS, a petition for the formation of the Rockwood Water PUD within Multnomah County was filed with the County Clerk; and

WHEREAS, the County Clerk certified the petition for formation of the PUD on September 1, 1989; and

WHEREAS, ORS 261.210 gives the County the discretion to decide whether or not to require a bond, cash deposit or other security for payment of the costs of a PUD election; and

WHEREAS, the Board has held a public hearing and considered testimony on whether a bond, cash deposit or other security should be required; and

WHEREAS, ORS Chapter 261 requires the Board to determine the boundaries for the proposed PUD after a public hearing held no less than 60 days after the petition is certified; and

WHEREAS, given the date of certification of the petition, the aforementioned hearing could not be held until after October 3, 1989; and

WHEREAS, the effective date of 1989 Oregon Laws Chapter 92 is October 3, 1989; and

WHEREAS, Section 10 of the above-mentioned 1989 law gives the Local Boundary Commission jurisdiction over petitions to form districts supplying or seeking to supply domestic water; and

WHEREAS, the proposed Rockwood Water PUD is a district seeking to supply domestic water and is therefore subject to Boundary Commission jurisdiction as of October 3, 1989;

NOW, THEREFORE, BE IT RESOLVED that:

1. No bond, cash deposit or other security shall be required for the election on the formation of the Rockwood Water PUD.

2. The Director of County Elections shall promptly transmit the certified petition to the Local Government Boundary Commission for such action as is appropriate.

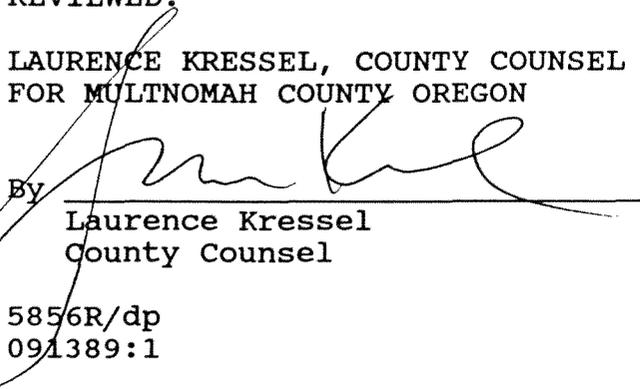
DATED this ____ day of _____, 1989.

BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

By _____
Gladys McCoy
Multnomah County Chair

REVIEWED:

LAURENCE KRESSEL, COUNTY COUNSEL
FOR MULTNOMAH COUNTY OREGON

By 

Laurence Kressel
County Counsel

5856R/dp
091389:1

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

B

In the Matter of Requiring A Bond,)
Cash Deposit or Other Security) RESOLUTION
For the Election on the Rockwood)
Water PUD)

WHEREAS, a petition for the formation of the Rockwood Water PUD within Multnomah County was filed with the County Clerk; and

WHEREAS, the County Clerk certified the petition for formation of the PUD on September 1, 1989; and

WHEREAS, ORS 261.210 gives the County the discretion to decide whether or not to require a bond, cash deposit or other security for payment of the costs of a PUD election; and

WHEREAS, the Board has held a public hearing and considered testimony on whether a bond, cash deposit or other security should be required; and

WHEREAS, ORS Chapter 261 requires the Board to determine the boundaries for the proposed PUD after a public hearing held no less than 60 days after the petition is certified; and

WHEREAS, given the date of certification of the petition, the aforementioned hearing could not be held until after October 3, 1989; and

WHEREAS, the effective date of 1989 Oregon Laws Chapter 92 is October 3, 1989; and

WHEREAS, Section 10 of the above-mentioned 1989 law gives the Local Boundary Commission jurisdiction over petitions to form districts supplying or seeking to supply domestic water; and

WHEREAS, the proposed Rockwood Water PUD is a district seeking to supply domestic water and is therefore subject to Boundary Commission jurisdiction as of October 3, 1989;

NOW, THEREFORE, BE IT RESOLVED that:

1. The following shall be required as a bond, cash deposit or other security for the election on the formation of the Rockwood Water PUD: \$_____.

2. The Director of County Elections shall promptly transmit the certified petition to the Local Government Boundary Commission for such action as is appropriate.

DATED this ____ day of _____, 1989.

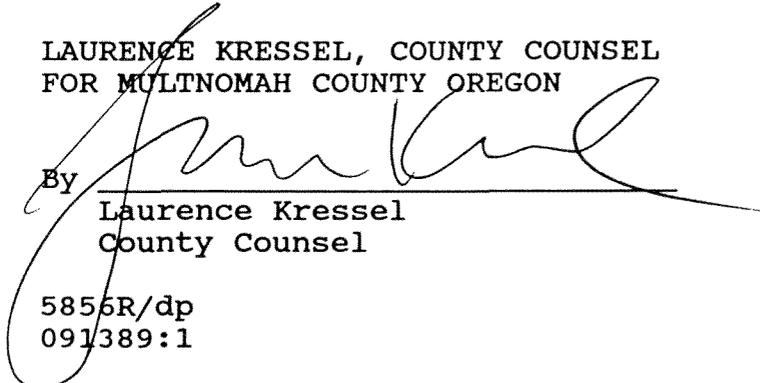
BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

By _____
Gladys McCoy
Multnomah County Chair

REVIEWED:

LAURENCE KRESSEL, COUNTY COUNSEL
FOR MULTNOMAH COUNTY OREGON

By



Laurence Kressel
County Counsel

5856R/dp
091389:1

ROCKWOOD WATER/PUD
SUMMARY

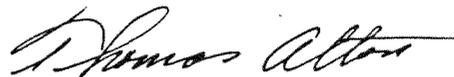
THE FORMATION OF ROCKWOOD WATER PUD ALREADY MEETS OR EXCEEDS REQUIREMENTS FOR TERRITORIAL FORMATION. THE AREA TO BE SERVED AND SERVICED HAS ALREADY BEEN IN OPERATION FOR A NUMBER OF YEARS UNDER THE NAME OF THE ROCKWOOD WATER DISTRICT.

BONDING REQUIREMENTS ARE QUESTIONABLE SINCE THE DISTRICT ALREADY HAS A GOOD RATING AND IS IN SOUND FINANCIAL CONDITION BOTH IN ASSETS AND LIABILITIES.

THE BOUNDARY COMMISSION WOULD HAVE LITTLE TO CONSIDER SINCE THE ROCKWOOD WATER DISTRICT HAS BEEN IN OPERATION A GOOD MANY YEARS WITH NO PROBLEMS WITH ITS CUSTOMERS. THE ONLY PROBLEM NOW IS PARTIES WANTING TO SEIZE SERVICE AREA OF CUSTOMERS WITHOUT CUSTOMER CHOICE OR COMPENSATION TO THE PRESENT ROCKWOOD DISTRICT MAKING IT NECESSARY TO TAKE STEPS TO PROTECT THEIR ASSETS AND INTERESTS.

WE FEEL THERE IS NO NEED FOR A LENGTHILY FIGHT OR EXCESS AMOUNT OF TIME TO CONSIDER THIS MATTER. GIVING THE COUNTY COMMISSIONERS CREDIT FOR DOING THEIR JOB, WE RESPECTIVELY ASK FOR A PROMPT VOTE THUS AVOIDING ANY DELAY FOR FILING TO LET THE PEOPLE DECIDE.

RESPECTFULLY



THOMAS ALTON CHAIRMAN
ENERGY AND UTILITIES
OREGON STATE GRANGE

DATE SUBMITTED Sept. 13, 1989

(For Clerk's Use)
Meeting Date 9/21/89
Agenda No. 1210

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Economic Opportunity Act

Informal Only* _____ (Date) Formal Only 9-21-89 (Date)

DEPARTMENT Board of County Commissioners DIVISION Gretchen Kafoury

CONTACT Terry Anderson TELEPHONE 248-5239

*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD no presentation

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

Resolution: to commemorate the 25th anniversary of Economic Opportunity Act of 1964 and to declare week of 9/24-9/30 as Economic Opportunity Week.

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

ACTION REQUESTED:

INFORMATION ONLY PRELIMINARY APPROVAL POLICY DIRECTION APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 2 minutes

IMPACT:

PERSONNEL

FISCAL/BUDGETARY
 -General Fund

Other _____

89-173
89-177
BOARD OF COUNTY COMMISSIONERS
OREGON
1989 SEP 14 AM 10:17

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: *Gretchen Kafoury*

BUDGET / PERSONNEL 1

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) *[Signature]*

OTHER _____
(Purchasing, Facilities Management, etc.)

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

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

In the Matter of Commemorating the)
25th Anniversary of the enactment of) RESOLUTION
the Economic Opportunity Act of 1964) 89-177

WHEREAS, it has been twenty-five years since the nation declared unconditional war on poverty through the enactment of the Economic Opprotunity Act of 1964; and

WHEREAS, the intent of the act was to provide opportunities for every citizen to be able to participate fully in this society and to live in decency and dignity; and

WHEREAS, the purpose of this legislation was to "eliminate the paradox of poverty in the midst of plenty" in the United States; and

WHEREAS, this legislation created such successful programs as Head Start, VISTA, Community ACtion Programs, Legal Services, Foster Grandparents, Job Corps, and Migrant and Seasonal Farmworker Programs; and

WHEREAS, the achievements of the programs included both advocacy and services in areas of great social needs such as family planning, alcohol and drug rehabilitation, day care centers, rural health clinics and programs for seniors; and

WHEREAS, in spite of the Act's repeal in 1981, the legacy and relevancy of these programs to eliminate or alleviate the causes and conditions of poverty continue today:

NOW, THEREFORE BE IT RESOLVED, that the week of September 24 through September 30, 1989 is hereby declared "Economic Opportunity Week" as a way to commemorate the spirit and accomplishments of the act and as a call to our community to rededicate ourselves to the tasks still ahead--for the war on poverty is not over.

DATED THIS 21st day of September, 1989.

BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

[SEAL]

By Gladys McCoy
Gladys McCoy
Multnomah County Chair

APPROVED AS TO FORM:

Laurence Kressel
LAURENCE KRESSEL, COUNTY COUNSEL
FOR MULTNOMAH COUNTY OREGON

DATE SUBMITTED 9/14/89

(For Clerk's Use)
Meeting Date 9/21/89
Agenda No. R-11

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: APPOINTMENTS

Informal Only* _____
(Date)

Formal Only SEPT. 21, 1989
(Date)

DEPARTMENT COUNTY CHAIR DIVISION _____

CONTACT JUDY BOYER TELEPHONE 248-3308

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD _____

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

SEE ATTACHED LIST

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

ACTION REQUESTED:

INFORMATION ONLY PRELIMINARY APPROVAL POLICY DIRECTION APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA _____

IMPACT:

PERSONNEL
 FISCAL/BUDGETARY
 General Fund
 Other _____

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: _____

BUDGET / PERSONNEL _____ / _____

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

OTHER _____
(Purchasing, Facilities Management, etc.)

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

Appointment of Sara lamb to the District Attorneys Citizen Budget Advisory Committee. Term expires 9/90.

Appointment of Vivian Starbuck to the Auditors Citizen Budget Advisory Committee. Term expires 9/90.

Appointment of Mark Prater to the Auditors Citizen Budget Advisory Committee. Term expires 9/92.

Re-appointment of Marlene Byrne to the General Services Citizen Budget Advisory Comm. Term expires 9/90.

Re-appointment of Jim Worthington to the Non-Dept'l Citizen Budget Advisory Comm. Term expires 9/90.

Re-appointment of Bob Luce to the Environmental Services Citizen Budget Advisory Board. Term expires 9/90.

Re-appointment of Frank Howatt to the General Services Citizen Budget Advisory Comm. Term expires 9/92.

Re-appointment of Lawrence McCagg to the Justice Services Citizen Budget Advisory Comm. Term expires 9/92.

Re-appointment of Andy Thaler to the District Atty's Citizen Budget Advisory Comm. Term expires 9/92.

Appointment of Mary Elizabeth Schwoefferman to the Sheriff's CBAC. Term expires 9/90.

Multnomah County Citizen Involvement Committee
VOLUNTEER INTEREST FORM



NAME VIVIAN STARBUCK
HOME ADDRESS: P.O. Box 121, FAIRVIEW zip 97024 Phone 665-924

PLACE OF EMPLOYMENT _____

ADDRESS _____

OCCUPATION HSWF

OPTIONAL: AGE 3 SEX F
ETHNICITY: BLACK _____ HISPANIC _____ NATIVE AMERICAN _____
ASIAN/PACIFIC ISLANDER _____ WHITE (non Spanish Sp.)

PLEASE CHECK MAILING ADDRESS PREFERENCE: HOME OFFICE _____

ARE YOU A RESIDENT OF MULTNOMAH COUNTY? YES NO _____

CITIZEN ADVISORY COMMITTEE PREFERENCE: See attached for list of County Boards, Commissions and Committees:

MULTI-CITIZENS INVOLVEMENT COMMITTEE

VOLUNTEER/BOARD/COMMITTEE EXPERIENCE: BOARD MBR. LEACH BOTANICAL PARKS SEC. PLANT SALE COMM CHR. FAIRVIEW PARK COMMITTEE, CHR. SEC. DUNEL, CHR.

OTHER RELEVANT EXPERIENCE MULT. CO. TASK FORCE FOR JUVENILE CONCERNS/REYNOLDS DIST. BUDGET COMM MBR. FAIRVIEW CITY COUNCIL MBR, FAIRVIEW GRADE SCH. ADV. COMM

PLEASE LIST NAME, ADDRESS AND TELEPHONE NUMBERS OF TWO REFERENCES:
1. KATHY CAVALI, 23680 N.E. HOLLADAY, TIDE, 661-5802
2. EVNICE DeCamp, 225 BRIDGE ST. FAIRVIEW, 665-3462

WOULD YOU HAVE A POTENTIAL CONFLICT OF INTEREST RELEVANT TO ANY COUNTY DEPARTMENT? NO

SIGNATURE Vivian Starbuck DATE 6-6-88

Please return to: Office of Citizen Involvement
2115 S.E. Morrison, Rm. 215, Portland, Oregon 97214
Phone: 248-3450

INTEREST FORM FOR MULTNOMAH COUNTY
CITIZEN INVOLVEMENT COMMITTEE

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

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

Name of Nominating Group Primary Prevention Advisory Comm.

Section I

Name SARA J. LAMB Address 5549 SE Yamhill St.

City Portland State OR zip 97215 Phone: Wk 233-5631 Hm 236-2621

Is your residence located in Multnomah County? Yes X No

Section II

Why are you interested in serving on the Multnomah County Citizen Involvement Committee? I have held an interest in local govt since being involved in the first Goldschmidt campaign in 1969-70. I feel it is time to devote some of my energy & experience to public service in the County where I have lived for 30 years.

Section III

Please list three volunteer/civic activities.

	Name of Organization	Dates	Responsibilities
One.	<u>Legislative Advisory Comm. on Elderly Health Care</u>	<u>1986</u>	<u>Member</u>
PSU	<u>Human Subjects Research Review Comm.</u>	<u>1981-84</u>	<u>Member</u>
	<u>HSA Advisory Committee</u>	<u>1977-78</u>	<u>Member</u>

see CV attached

Section IV

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

Neil Goldschmidt
Caroline Miller

Section V

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

I am employed by Kaiser Foundation Hospitals - no known conflict of interest

Section VI

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

Birth Date: Month 3 Day 31 Year 36 Sex: Female Male

Ethnic Origin: Asian Black Hispanic
Native American White

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

Signature Sara J Lamb Date 2/7/87

JB
SEP 6 1989

Multnomah County Citizen Involvement Committee
VOLUNTEER INTEREST FORM



NAME MARK A PRATER
HOME ADDRESS: 2367 N.W. Kearney Street Zip 97210 Phone 227-3978
through September 30
PLACE OF EMPLOYMENT Dunn, Carney, Allen, Higgins & Tongue
ADDRESS 851 S.W. Sixth Avenue, Suite 1500 Portland, OR 97204
OCCUPATION Attorney

OPTIONAL: AGE 30 SEX M
ETHNICITY: BLACK HISPANIC NATIVE AMERICAN
ASIAN/PACIFIC ISLANDER WHITE (non Spanish Sp.) X

PLEASE CHECK MAILING ADDRESS PREFERENCE: HOME OFFICE X

ARE YOU A RESIDENT OF MULTNOMAH COUNTY? YES X NO

CITIZEN ADVISORY COMMITTEE PREFERENCE: See attached for list of County Boards, Commissions and Committees:

1. Auditor 2. 3.

VOLUNTEER/BOARD/COMMITTEE EXPERIENCE: Legislative Sub-Committee,
Oregon State Bar Taxation Committee

OTHER RELEVANT EXPERIENCE Washington State Certified Public Accountant

PLEASE LIST NAME, ADDRESS AND TELEPHONE NUMBERS OF TWO REFERENCES:

1. Chris Carson-Allen, Kilmer, Schrader, 1600 Orbanco Bldg. 1001 SW 5th
Portland, OR 97204
2. Peter Burger-Hanna, Murphy, ET Al 1211 SW 5th Avenue, Portland, OR 97204

WOULD YOU HAVE A POTENTIAL CONFLICT OF INTEREST RELEVANT TO ANY COUNTY DEPARTMENT? No - Multnomah

SIGNATURE *Mark A. Prater* DATE September 5, 1989

Please return to: Office of Citizen Involvement
2115 S.E. Morrison, Rm. 215, Portland, Oregon 97214
Phone: 248-3450

MULTNOMAH COUNTY CITIZEN INVOLVEMENT COMMITTEE
VOLUNTEER INTEREST FORM

NAME Mary Elizabeth Schwoeffermann

HOME ADDRESS 745 S.E. Miller Street, P/d., Oregon. ZIP 97202

PLACE OF EMPLOYMENT Home - 745 Miller

OCCUPATION Day Care Provider

HOME PHONE 238- 0671 WORK PHONE 238- 0671

VOLUNTEER/BOARD/COMMITTEE EXPERIENCE Five years active member of
National Youth Council

OTHER RELATED EXPERIENCE Over nine years employed with the Save the
Children Fund as a Social Field Worker in the West Indies.

Associated member of Queen of Roses No. 164 Young Ladies; Institute & P.R.O.

AREAS OF INTEREST

Human Services <u>✓</u>	Planning, Development _____
Justice Services _____	Facilities, transportation _____
Environmental Services _____	Education <u>✓</u>
Youth <u>✓</u>	Aging _____ Health _____
Other _____	

OPTIONAL: AGE 40 SEX Female
ETHNICITY: African American _____ Native American _____
Hispanic _____ Asian/Pacific Islander ✓
White (non-Spanish Speaking) _____

PLEASE LIST NAME, ADDRESS AND TELEPHONE NUMBER OF TWO REFERENCES:

1. Mercedes Loprinzi 2642 N.E. 43rd. (97213) Tel. # 503 288-3788
2. Molly & John Zimmerman 7230 S.E. 13th, P/d. Oregon 97202 Tel. 232-9712

WOULD YOU HAVE A POTENTIAL CONFLICT OF INTEREST WITH ANY COUNTY DEPARTMENT? No

Please mail to: Office of Citizen Involvement
2115 SE Morrison, Portland, OR 97214
Phone: 248-3450

DATE SUBMITTED Sept. 7, 1989

(For Clerk's Use)
Meeting Date 9/21/89
Agenda No. R-72

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Appointments

Informal Only* _____
(Date)

Formal Only Sept. 21, 89
(Date)

DEPARTMENT County Chair

DIVISION _____

CONTACT Judy Boyer

TELEPHONE 248-3308

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD _____

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

SEE ATTACHED LIST

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

ACTION REQUESTED:

INFORMATION ONLY PRELIMINARY APPROVAL POLICY DIRECTION APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 5 min.

IMPACT:

PERSONNEL
 FISCAL/BUDGETARY
 General Fund
 Other _____

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: *Harley McEly*

BUDGET / PERSONNEL _____

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

OTHER _____
(Purchasing, Facilities Management, etc.)

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

Appointment of Chuck Wyland, Nancy Gorshe, and
Kate Drew to the Portland/Multnomah Commission on Aging.
Terms Expire 7/92.

Re-appointment of Augustust Morgan, William French
and Elizabeth Davis to the Portland/~~M~~ultnomah Commission on
Aging. Terms expire 7/92.

APR 18 RECD

APPLICATION

for Membership on the

PORTLAND/MULINOMAH COMMISSION ON AGING (PMCoA)

for BOTH Commission and Committee Positions

referred to CoC
Served on CoC
Since 2/89

1. Name Charles P. Wyland

Address 409 SE 30 th. Portland, OR. (Zip) 97214

Phone (Home) 239-4285 (Work) 244-6111 Ext.4582

2. Education: Please indicate highest level completed.

High School _____ College (Undergraduate) 3 yrs.

Other _____ College (Post-Graduate) _____

3. Employment Status:

Employed Full Time X Retired _____

Part Time _____ Not Employed _____

4. Current or past place of employment:

Organization/Address

Dates

Responsibilities

Senior Job Center 12000 SW 49 th. Portland, OR, 97219

6/15/85

Information & Referral

Assist Director

5. Current and past volunteer/civic activities:

Organization/Address

Dates

Responsibilities

PORTLAND GRAY PANTHERS

JUNE '89 +

6. Why do you want to serve on the Commission/Committee?

Am concerned about keeping our seniors in their homes,
also, about care they receive when they are put in a new enviroment.

APPLICATION

for *Membership on the
PORTLAND/MULTNOMAH COMMISSION ON AGING (PMCoA)
for BOTH Commission and Committee Positions

1. Name NANCY GORSHE
Address 50 Kerr Pkwy #83 (Zip) 97035
Phone (Home) 635-3993 (Work) 230-6002

WACE
OSW 283

2. Education: Please indicate highest level completed.

High School _____ College (Undergraduate) _____

Other _____ College (Post-Graduate) ✓ MSW

3. Employment Status:

Employed Full Time ✓ Retired _____

Part Time _____ Not Employed _____

Profession: (Please specify) Providence Med Ctr, Administration

4. Current or past place of employment:

Organization/Address	Dates	Responsibilities
<u>Prov. Med Ctr, Portland</u>	<u>88</u>	<u>Coord. Gerontology Progs. (43)</u>
<u>NATI ASSN AREA AGENCIES ON AGING WASH DC</u>	<u>81-88</u>	<u>ASST. DIR (lobbyist)</u>
<u>Home Health Services of Puget Sound</u>	<u>78-81</u>	<u>ASST. DIR Home Health EXEC. DIR DAY HEALTH</u>

5. Current and past volunteer/civic activities:

Organization/Address	Dates	Responsibilities
<u>Oregon Gerontological Assn</u>	<u>'88</u>	<u>Bd of DIRS</u>
<u>NATI Council on Aging</u>	<u>'88</u>	<u>NATI Inst Com Based Long Term Care Bd Member</u>
<u>American Society on Aging</u>	<u>73-88</u>	<u>Member</u>

6. Why do you want to serve on the Commission/Committee?

Because of my past experiences as staff
to AAAs in Wash. State & N4A in Wash DC and
my work with Advisory Councils of AAAs
across the country, I believe I can bring
these experiences to the Commission as well
as participate in this community's planning process

7. What are your specific areas of interest?

- Health Nursing Homes Community Services Medicare
- Media Transportation Social Security Employment
- Housing Nutrition Elder Abuse Mental Health
- Other (Please Specify) Legislative Advocacy

8. I am interested in serving as a: Commission Member
 Committee Member

9. What PMCoA Committee are you interested in serving on?

- (3) Health & Well Being Transportation Long-Term-Care Ombudsman
- (2) Continuum of Care (1) Area Agency on Aging

10. Give two references:

Name	Address	Phone	Relationship
Ed Sage	Mid-Willamette AAA	371-1313	{ past Bd. member personal friend
Shirley Buxton	Providence Med Ctr	230-6402	current co-worker
Charles Reed	WASH. STATE BUREAU of Aging and Adult Services	206 586-3768	PAST co-worker

THIS SECTION IS VOLUNTARY AND WILL REMAIN CONFIDENTIAL

Since our bylaws require representation from certain categories of individuals we request your assistance in supplying this information.

Are you over 60? Under 60? Are you low-income? Yes No

Do you have a disability? Yes No

Ethnic origin: Black Native American Hispanic
 Asian White Other

All Commission members must live in Portland or Multnomah County.

The following persons shall be ineligible for membership on the PMCoA: Board members, paid professionals, or individuals with ownership interest in agencies who contract with/or receive substantial funds or benefit personally from the Area Agency on Aging (OAA, XIX, SSBG, OPI, etc.), County Dept. of Human Services, City Human Resources Bureau, State Dept. of Human Resources or Senior Services Division.

* Those ineligible for membership due to conflict of interest may serve on committees in a non-voting status.

Signature *[Handwritten Signature]* Date 8-5-88

Return completed application to: Becky Wehrli, Portland/Multnomah Commission on Aging, 1120 SW 5th Avenue, 10th Floor, Portland, OR 97204, PHONE 796-5269

APPLICATION

for Membership on the

PORTLAND/MULTNOMAH COMMISSION ON AGING (PMCoA)

for BOTH Commission and Committee Positions

8/29/88

H+W 88/89

1. Name Mrs. Kathleen (Kate) Kennedy Drew
 Address 12819 SE State St (Zip) 97233
 Phone (Home) 255-8432 (Work) —

2. Education: Please indicate highest level completed.
 High School _____ College (Undergraduate) _____
 Other _____ College (Post-Graduate) X

3. Employment Status:
 Employed Full Time _____ Retired X
 Part Time _____ Not Employed _____

4. Current or past place of employment:

Organization/Address	Dates	Responsibilities
<u>Portland Public Schools</u>	<u>1959-1985</u>	<u>Teacher</u>

5. Current and past volunteer/civic activities:

Organization/Address	Dates	Responsibilities
<u>Bethlehem Lutheran</u>	<u>1986-88</u>	<u>Evangelism Director</u>
<u>Council of Ch. Women</u>		<u>Education Chairperson</u>
<u>Albertina's - Cook & PR</u>	<u>1985-88</u>	
<u>Pi Lambda Theta</u>	<u>1986- --</u>	<u>V.P. & Pres</u>
<u>Loaves & Fishes</u>	<u>1985 -></u>	

6. Why do you want to serve on the Commission/Committee?
I feel a concern for the aging -
our church is an older congregation
& feel that perhaps I can make
a contribution.

7. What are your specific areas of interest?

- Health Nursing Homes Community Services Medicare
- Media Transportation Social Security Employment
- Housing Nutrition Elder Abuse Mental Health
- Other (Please Specify) _____

8. I am interested in serving as a: Commission Member X (5/19/89)
Committee Member X

9. What PMCoA Committee are you interested in serving on?

- 1 Health & Well Being Transportation Long-Term-Care Ombudsman
- 2 Continuum of Care Area Agency on Aging

10. Give two references:

Name	Address	Phone	Relationship
Becky Thomas	435 SW 5th Blain	237-4655	Friend
Pastor E. Harold Houge	3825 NE Alameda Church	234-3601 234-6569	Friend/Pastor

THIS SECTION IS VOLUNTARY AND WILL REMAIN CONFIDENTIAL

Since our bylaws require representation from certain categories of individuals we request your assistance in supplying this information.

Are you over 60? Under 60? Are you low-income? Yes No

Do you have a disability? Yes No

Ethnic origin: Black Native American Hispanic
 Asian White Other

All Commission members must live in Portland or Multnomah County.

The following persons shall be ineligible for membership on the PMCoA: Board members, paid professionals, or individuals with ownership interest in agencies who contract with/or receive substantial funds or benefit personally from the Area Agency on Aging (OAA, XIX, SSBG, OPI, etc.), County Dept. of Human Services, City Human Resources Bureau, State Dept. of Human Resources or Senior Service Division.

* Those ineligible for membership due to conflict of interest may serve on committees in a non-voting status.

Signature Kathleen K. Skov Date 5-23-88

Return completed application to: Becky Wehrli, Portland/Multnomah Commission on Aging, 1120 SW 5th Avenue, Room 518, Portland, OR 97204, PHONE 796-5269.

DATE SUBMITTED Sept. 7, 89

(For Clerk's Use)
Meeting Date 9/21/89
Agenda No. R-13

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: Appointments

Informal Only* _____
(Date)

Formal Only Sept. 21, 89
(Date)

DEPARTMENT County Chair

DIVISION _____

CONTACT Judy Boyer

TELEPHONE 248-3308

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD _____

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

SEE ATTACHED LIST

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

ACTION REQUESTED:

INFORMATION ONLY PRELIMINARY APPROVAL POLICY DIRECTION APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA _____

IMPACT:

PERSONNEL
 FISCAL/BUDGETARY
 General Fund
 Other _____

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: *Judy Boyer*

BUDGET / PERSONNEL _____

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

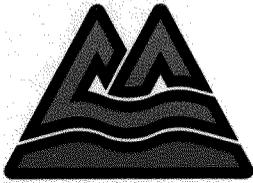
OTHER _____
(Purchasing, Facilities Management, etc.)

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

Appointment of Karma Sweet to the Sheriff's Citizen
Budget Advisory Committee. Term expires 9/90.

Appointment of Rachel Summer to the Sheriff's Citizen
Budget Advisory Committee. Term expires 9/91.

Re-appointment of Don Church to the Sheriff's Citizen
Budget Advisory Committee. Term expires 9/92.



MULTNOMAH COUNTY OREGON

2115 S.E. MORRISON #215
PORTLAND, OREGON 97214
(503)248-3450

CITIZEN INVOLVEMENT COMMITTEE

JOHN MILLER
CIC Chair

Neighborhoods West-Northwest

- Lianne Thompson
- Alex Pierce

SW Neighborhood Information

- Martha White
- John Miller, CIC Chair

North Portland Citizens

- Mark Williams

NE Coalition of Neighborhoods

- Richard Levy
- Dennis Payne, CIC V.Chair

Central Northeast Neighbors

- Scott Holzem

SE Uplift

- Ben Butzien
- Karma Sweet

East of E.181st Avenue

- Charles Herndon
- Vivian Starbuck

Between E.60th & E.181st

- Franklin Jenkins
- Robert Luce, CIC Secretary
- Jim Worthington

West of E.60th, uninc.

- Ann Porter

County Boards, Commissions, & Civic Groups

- Marlene Byrne
- Jean Ridings
- Sara Lamb, CIC Treasurer

Office of Citizen Involvement

- Merlin Reynolds, Executive Director
- Gloria Fisher, Information Coordinator

August 15, 1989

MEMORANDUM

B
AUG 16 1989

To: Chair Gladys McCoy

From: Gloria Fisher
Office of Citizen Involvement

Re: Citizen Budget Advisory Committees

The following are nominations for appointment to the Sheriff's Citizen Budget Advisory Committee.

Don Church Position 7 Expires Sept. 1, 1992
Mr. Church is to be reappointed at the request of the Sheriff.

Karma Sweet Position 6 Expires Sept. 1, 1990
Ms. Sweet is a member of the Citizen Involvement Committee

Rachael Summer Position 3 Expires Sept. 1, 1991
Ms. Summer will fill the unexpired position of Morris Brewer who resigned due to moving out of state. She is nominated by the CIC.

Enclosed are interest forms from Karma and Rachael. You have Don's interest form.

Multnomah County Citizen Involvement Committee
VOLUNTEER INTEREST FORM



NAME Rachel Summer
HOME ADDRESS: 5723 S.E. Bush St. Zip 97206 Phone 775-3267

PLACE OF EMPLOYMENT Portland Center for the Performing Arts
ADDRESS 1111 S.W. Broadway

OCCUPATION Administrative Secretary

OPTIONAL: AGE 41 SEX Female
ETHNICITY: BLACK HISPANIC NATIVE AMERICAN X
ASIAN/PACIFIC ISLANDER WHITE (non Spanish Sp.)

PLEASE CHECK MAILING ADDRESS PREFERENCE: HOME X OFFICE

ARE YOU A RESIDENT OF MULTNOMAH COUNTY? YES X NO

CITIZEN ADVISORY COMMITTEE PREFERENCE: See attached for list of County Boards, Commissions and Committees:

1. DHR C-BAC (7) 2. CIC (8) 3. DUII (14)

VOLUNTEER/BOARD/COMMITTEE EXPERIENCE: 2 years Personnel BAC for City
(1 yr as Chair), work with underprivileged children 3 years

OTHER RELEVANT EXPERIENCE 3 years drug and alcohol experience (set up
3 new DUII program, ran the children's program), 3 years training and
development at Blue Cross & Blue Shield of Oregon (audited new training
programs, materials, prepared training materials, produced video training)

PLEASE LIST NAME, ADDRESS AND TELEPHONE NUMBERS OF TWO REFERENCES:

1. Karma Sweet 6744 S.E. Gladstone St., Portland, OR 97206, 775-6494
2. John Legry, Office of Neighborhood Associations, City of Portland
248-4519

WOULD YOU HAVE A POTENTIAL CONFLICT OF INTEREST RELEVANT TO ANY COUNTY DEPARTMENT? no

SIGNATURE Rachel Summer DATE 7-6-89

Please return to: Office of Citizen Involvement
2115 S.E. Morrison, Rm. 215, Portland, Oregon 97214
Phone: 248-3450

Multnomah County Citizen Involvement Committee
VOLUNTEER INTEREST FORM



NAME Karma Sweet

Mailing
HOME ADDRESS: PO Box 06906 zip 97206 Phone 725-6494

PLACE OF EMPLOYMENT self
home
ADDRESS 6744 SE Gladstone St.

OCCUPATION counselor / sales

OPTIONAL: AGE 53 SEX F
ETHNICITY: BLACK HISPANIC NATIVE AMERICAN
ASIAN/PACIFIC ISLANDER WHITE (non Spanish Sp.)

PLEASE CHECK MAILING ADDRESS PREFERENCE: HOME OFFICE *Mailing*

ARE YOU A RESIDENT OF MULTNOMAH COUNTY? YES NO

CITIZEN ADVISORY COMMITTEE PREFERENCE: See attached for list of County Boards, Commissions and Committees:

?
~~1. 2. 3.~~

1. CIC 2. _____ 3. _____

VOLUNTEER/BOARD/COMMITTEE EXPERIENCE: Bac-personnel

OTHER RELEVANT EXPERIENCE counseling - own business -
assisted variety of small business & offices
set up & clean out.

PLEASE LIST NAME, ADDRESS AND TELEPHONE NUMBERS OF TWO REFERENCES:

1. Rachel Seemmes 5722 SE Bush 775-3267
2. Roger Redfern 1764 SE Ladd Ave 233-2011

WOULD YOU HAVE A POTENTIAL CONFLICT OF INTEREST RELEVANT TO ANY COUNTY DEPARTMENT? not that I know of

SIGNATURE _____ DATE 10/31/88

Please return to: Office of Citizen Involvement
2115 S.E. Morrison, Rm. 215, Portland, Oregon 97214
Phone: 248-3450

DATE SUBMITTED _____

(For Clerk's Use)
Meeting Date 9-21-89
Agenda No. R-14

REQUEST FOR PLACEMENT ON THE AGENDA

Subject: City/County Housing Management Plan Development Council

Informal Only* _____
(Date)

Formal Only September 21, 1989
(Date)

DEPARTMENT Non-Dept., County Chair DIVISION _____

CONTACT Merlin Reynolds TELEPHONE 248-3308

*NAME(S) OF PERSON MAKING PRESENTATION TO BOARD _____

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

Creation of a five-member City/County Housing Management Plan Development Council to supervise the analysis and policy review required to develop a County-wide Housing Management Plan.

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

ACTION REQUESTED:

INFORMATION ONLY PRELIMINARY APPROVAL POLICY DIRECTION APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 20 minutes

IMPACT:

PERSONNEL
 FISCAL/BUDGETARY
 General Fund
 Other _____

89-194

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: *Gladys May*

BUDGET / PERSONNEL _____

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) *Sandra Duff*

OTHER _____
(Purchasing, Facilities Management, etc.)

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

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR MULTNOMAH COUNTY, OREGON

In the matter of)
CITY/COUNTY HOUSING)
MANAGEMENT PLAN)
DEVELOPMENT COUNCIL)
RESOLUTION
#89-194

WHEREAS the City of Portland, Multnomah County, the Housing Authority of Portland and United Way of the Columbia-Willamette have collaborated to design, manage, and fund a study of the delivery of housing services in Multnomah County; and

WHEREAS the study completed in August 1988 concluded that improvements could be made by coordinating delivery of housing services in Multnomah County; and

WHEREAS the Portland Metropolitan Chamber of Commerce and the joint City-County Funders Advisory Committee both reviewed the housing study and acted to recommend continued effort to implement its recommendations; and

WHEREAS City, County and Housing Authority of Portland personnel have continued to examine Housing Management Plan issues; and

WHEREAS supervision of the analysis and policy review required to develop a County-wide Housing Management Plan can best be accomplished by a Housing Management Plan Development Council comprised of elected officials from the City and County; and

NOW, THEREFORE, BE IT RESOLVED:

1. A five-member City-County Housing Management Plan Development Council is hereby created with membership comprised of three Portland City Council members and two members of the County Board of Commissioners as follows:
 - a. County Chair McCoy
 - b. County Commissioner, Gretchen Kafoury
 - c. Mayor Clark
 - d. Commissioner of Public Works, Earl Blumenauer
 - e. Commissioner of Public Safety, Dick Bogle

2. The Housing Management Council is directed to develop a County-wide Housing Management Plan:
- a. The plan should propose a system that will:
 - 1) Be responsive to public policy.
 - 2) Promote maximum efficiency and effectiveness.
 - 3) Minimize unnecessary administrative duplication.
 - 4) Clearly establish accountability for results.
 - 5) Be easily understood by the public.
 - 6) Respond to citizen concerns in a timely manner.
 - b. The plan should identify a structure that will be responsible for:
 - 1) Increasing resources available for direct services.
 - 2) Developing Housing policy recommendations.
 - 3) Conducting needs assessments and resource inventories.
 - 4) Coordinating delivery of programs.
 - 5) Preparing housing related plans, including those for:
 - a) Long-range development
 - b) Implementation, and
 - c) Evaluation.
 - 6) Responding to citizen concerns in a timely manner.

3. The Housing Management Council shall complete the above work on or before June 30, 1990, and

BE IT FURTHER RESOLVED:

The County Chair is authorized to develop an intergovernmental agreement with the City, subject to ratification by the Board, to implement this Resolution, addressing such issues as funding, staffing and related costs.

ADOPTED this 21st day of September, 1989.

MULTNOMAH COUNTY, OREGON

(S E A L)

By


Gladys McCoy, County Chair

REVIEWED:

LAWRENCE KRESSEL, COUNTY COUNSEL
for Multnomah County, Oregon

By Sandra Duffy

SUBJECT: Work Session ****CANCELLED****
Continuing Discussion Regarding Corrections Issues

PRESS LIST

DATE: 9/21/89

THE FOLLOWING WERE CALLED THIS DATE REGARDING:

- a) Meeting: 9/21/89
- b) Executive Meeting: _____
- c) Other: Work Session

Signed: _____

Barry Peterson

KOIN	Channel 6	464-0797 or 464-0614	Assignment Desk ✓
KGW	Channel 8	226-5111	Assignment Desk ✓
KATU	Channel 2	231-4260	Assignment Desk ✓
KPTV	Channel 12	222-9921	News Desk ✓
KPDX	Channel 49	239-4949	Lee Haglund
KEX	1190 AM	222-1929	Newsroom/Message <i>on Air - no message</i>
KSGO	1520 AM	223-1441	News Desk (After 9, Before 11:30) ✓
KXL	750 AM	231-1071/0750	Newsroom/Message ✓
KGW	62 AM	226-5095	News Desk ✓
K-103 FM		643-5103	Newsroom ✓
KXYQ - 105 FM		226-6731	✓
Oregonian		294-4065	Liz Moore OR
		294-4065	Michele McClellan
Gresham Outlook		665-2181	Robin Franzen ✓
Skanner		287-3562	Patrick Mazza ✓
Cable		667-7636	Lisa Morrison

on recorder out of office

SUPPLEMENTAL AGENDA

THURSDAY, SEPTEMBER 21, 1989

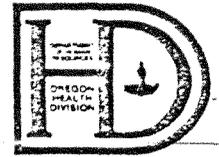
WORK SESSION - Continuing Discussion Regarding Corrections Issues

CANCELLED

0500C.73

Vaughn 591.
8617
Longaker
17775 S.W.
Washington Ct
Beaverton Or.

COMMUNICABLE DISEASE SUMMARY



Volume 38, No. 1
January 3, 1989

Monday -Friday - 229-5821
Emergency Number - 229-5599

SURVIVAL OF HIV ON ENVIRONMENTAL SURFACES

Questions often arise about the stability of HIV on environmental surfaces and its inactivation by commonly used disinfectants.

Laboratory studies to assess HIV survival rely on complicated testing methods to longitudinally determine virus infectivity after exposure to heat, drying or chemicals. To enable researchers to measure log reductions in infectious virus or reverse transcriptase activity, the concentration of HIV (7 to 10 logs of viral activity) used for studies is at least five orders of magnitude times greater than that encountered in clinical situations. Although these studies do not simulate real life situations in which the virus is present in small quantities, information derived can be applied to assess the adequacy of routine housekeeping and infection control procedures.

Studies performed at the Centers for Disease Control (CDC) demonstrated that drying HIV causes a rapid (within several hours) 1-2 log (90-99%) reduction in HIV concentration.⁽¹⁾ In another study, which used a highly concentrated preparation of HIV, infectious cell-free virus could be recovered from dried material for up to three days; in an aqueous environment, infectious virus survived longer than 15 days at room temperature.⁽²⁾ Though these results may seem alarming at first glance, it is important to understand that the objective of the study was to evaluate infection control procedures and the preparation of HIV employed was 100,000 times more concentrated than would normally occur in the blood of an HIV-infected person.

Study results indicated that HIV is very sensitive to chemical disinfectants. Commonly employed germicides used at recommended concentrations inactivated HIV within two to ten minutes.⁽²⁾ Sodium hypochlorite (household bleach) diluted 1:10 and 70% alcohol (ethyl; isopropyl) were effective in inactivating HIV within one minute of exposure.⁽²⁾ An earlier study also showed that alcohol and bleach were efficient inactivators in addition to phenolics, hydrogen peroxide and paraformaldehyde.⁽³⁾

The results of these studies do not necessitate any changes in currently recommended procedures for sterilization or disinfection in health care settings or housekeeping in public, private or health care facilities.⁽³⁾ Medical devices contaminated with blood/body fluids should first be thoroughly cleaned with soap/detergent and water to remove organic material and then appropriately disinfected or sterilized depending on the type and usage of the device. Environmental surfaces should be kept clean, but extraordinary measures of sanitation and/or disinfection are not necessary because these surfaces are not associated with HIV transmission to clients or patients. In general, for most non-clinical settings, the best disinfectant is a fresh 1:10 to 1:100 dilution of bleach (1/4 cup bleach in 1 gallon water = 1:64).

References

1. CDC. Recommendations for prevention of HIV transmission in health care settings. MMWR 1987;36 (suppl no. 2S:1s-18s).
2. Resnick L, Veren K, Salahuddin SK, Tondreau S, Markham PD. Stability and inactivation of HTLV-III/LAV under clinical and laboratory environments. JAMA 1986;255:1887-1891.
3. Martin LS, McDougal JS, Loskoski SL. Disinfection and inactivation of the human T-lymphotropic virus type III/lymphadenopathy-associated virus. J Inf Dis 1985;152:400-403.

Reprinted from Wisconsin AIDS Update, April 1988.

Stability and Inactivation of HTLV-III/LAV Under Clinical and Laboratory Environments

Lionel Resnick, MD; Keith Veren; S. Zaki Salahuddin, MS; Sue Tondreau; Phillip D. Markham, PhD

• The stability of human T-cell lymphotropic virus type III/lymphadenopathy-associated virus (HTLV-III/LAV) under environmental conditions encountered in a clinical or laboratory setting and its inactivation by commonly used chemical disinfectants were investigated. Under our experimental conditions utilizing a highly concentrated viral preparation, virus with an initial infectious titer of approximately $7 \log_{10}$ tissue culture infectious dose (TCID₅₀) per milliliter can be recovered for more than a week from an aqueous environment held at room temperature (23 to 27 °C) or at 36 to 37 °C. Virus recovery is reduced at a rate of approximately $1 \log_{10}$ TCID₅₀ per 20 minutes when held at 54 to 56 °C. Dried and held at room temperature, HTLV-III/LAV retains infectivity for more than three days with a reduction of approximately $1 \log_{10}$ TCID₅₀ per nine hours. Viral infectivity is undetectable and reduced more than $7 \log_{10}$ TCID₅₀ within one minute with 0.5% sodium hypochlorite, 70% alcohol, or 0.5% nonidet-P40, and within ten minutes with 0.08% quaternary ammonium chloride or with a 1:1 mixture of acetone-alcohol. These results help provide a rational basis to prevent the accidental spread of HTLV-III/LAV in the laboratory or clinical setting.

(JAMA 1986;255:1887-1891)

HUMAN T-cell lymphotropic virus type III/lymphadenopathy-associated virus (HTLV-III/LAV), the etiologic agent of the acquired immunodeficiency syndrome (AIDS) and AIDS-related complex,^{1,7} infects helper/inducer (OKT4+/Leu 3a+) T lympho-

cytes and possibly other cell types with a direct cytopathic effect and/or with indirect effects on cells involved in cellular and humoral immunity, as noted in the literature^{8,11} and our personal observations. The HTLV-III/LAV is transmitted primarily by sexual contact and through blood or blood products in vivo, and will infect fresh human helper/inducer T lymphocytes, as well as established T- and B-lymphoid and monocytoid cell lines in vitro^{9,10,12} (unpublished data, S.Z.S. and P.D.M., 1985). In view of the serious consequence of HTLV-III/LAV infection, its stability under

clinical and laboratory conditions and its inactivation by commonly utilized inactivating agents and disinfectants are of tremendous importance to health care workers and laboratory personnel.

Here, the results of testing the stability of HTLV-III/LAV under various experimental conditions are reported. The test system utilized different HTLV-III/LAV isolates to infect fresh human peripheral blood mononuclear cells and, in some instances, an established T-cell line, H9.² Cell cultures were propagated for more than a month to facilitate the detection of low quantities of virus.

These and similar studies should lead to a more complete understanding of the stability of HTLV-III/LAV and to the development of rational procedures to limit its accidental spread in the laboratory or clinical setting.

METHODS HTLV-III Viruses

Isolate HTLV-III (TM) was obtained from the culture supernatant of normal peripheral blood mononuclear cells infected with virus isolated from a patient with AIDS.¹¹ The virus stock contained approximately 10^7 total virus particles per milliliter by electron microscopy count. The HTLV-III (H9) was obtained from the culture supernatant of H9 cells infected by multiple isolates of virus² and was concen-

From the Laboratory of Tumor Cell Biology, National Institutes of Health, Bethesda, Md (Dr Resnick and Mr Salahuddin); the Department of Cell Biology, Bionetics Research, Inc, Rockville, Md (Mr Veren, Ms Tondreau, and Dr Markham); and the Dermatology Department, Mount Sinai Hospital-Medical Center, Miami Beach, Fla (Dr Resnick).

Reprint requests to Bionetics Research, Inc, 1330 Piccard Dr, Rockville, MD 20850-4373 (Dr Markham).

trated $\times 1,000$ by banding in sucrose. The H9 virus stock had a total virus particle count of 10^{11} to 10^{12} /mL. Using the Reed and Muench method¹¹ for calculation of the tissue culture infectious dose (TCID₅₀) of virus, virus stock HTLV-III (TM) contained an infectious titer of approximately $7 \log_{10}$ TCID₅₀/mL and the $\times 1,000$ concentrated HTLV-III (H9) approximately $10 \log_{10}$ TCID₅₀/mL. Filtered (cell-free) TM and H9 stocks were stored at -100°C until used.

Preparation of Peripheral Blood Mononuclear Cells and H9 Cells

Peripheral blood mononuclear cells (PBCs) were obtained by leukopheresis of healthy adults and banding by Ficoll-Hypaque gradient centrifugation. These mononuclear cells were incubated in growth medium (RPMI 1640, with 20% heat-inactivated fetal calf serum and 0.25 mg/mL of glutamine) containing 5 mg/L of phytohemagglutinin for 48 hours at 37°C in a 5% carbon dioxide atmosphere. They were then washed with phosphate-buffered saline (PBS) and refed with growth medium containing 10% purified interleukin-2,¹⁴ as previously described.¹³ The established T-cell line H9¹ was maintained in growth medium until used.

Infectivity Assays

Virus-containing supernatant fluids were thawed and diluted with 50% human plasma before use for experimental procedures. After the indicated treatment, sequential dilutions of the treated virus or untreated control virus were prepared in PBS and 1.0 mL of each dilution was used to infect fresh PBCs or the T-cell line H9.¹

For infection, target cells were seeded at a concentration of 10^6 /mL and exposed to diethylaminoethyl dextran (25 mg/L) for 20 minutes at 37°C . Cells were then rinsed twice with PBS, pelleted, and 5 to 6×10^6 cells exposed to 1 mL of treated or untreated HTLV-III for 90 minutes at 37°C . After infection, cells were resuspended in fresh growth medium supplemented with 10% interleukin-2 and carried in triplicate cultures maintained at 0.5 to 1×10^6 cells per milliliter at 37°C in humidified air containing 5% carbon dioxide. Viral TCID₅₀ was determined as described previously.¹¹ With some reagents or conditions, HTLV-III-infected H9 cells were exposed for the indicated times, rinsed, and 5×10^6 cells cocultivated with 5×10^6 uninfected H9 cells.

Monitoring Infectivity

Media changes were performed at three- to four-day intervals, and the viable cell concentration was adjusted to 0.5 to 1×10^6 cells per millimeter. To determine infected

cell cultures, cells were monitored for characteristic cytopathic effect by light microscopy of Wright-Giemsa-stained cells and supernatant fluids were assayed for particle-associated reverse transcriptase activity, as previously described, using Mg^{++} as divalent cation, oligo dT-poly(rA) or oligo dG-poly(rC) as primer-template representing viral polymerase activity, and oligo dT-poly(dA) as primer-template representing cellular polymerase activity.¹¹ Results are expressed as counts per minute of methyl-tritiated-deoxythymidine triphosphate (16 to 18 Ci/mmol) incorporated per 10 μ L of culture fluid concentrated 17-fold. Cell cultures were monitored for a minimum of a month.

Temperature Conditions

One milliliter of each dilution of HTLV-III (TM) was exposed to the following temperatures and time periods: room temperature (23 to 27°C) for 2, 3, 4, 6, 11, and 15 days; 36 to 37°C for 2, 3, 4, 6, 11, and 15 days; and 54 to 56°C for 30 minutes and 1, 3, and 5 hours. Virus suspended in 50% human plasma was placed in closed tubes and incubated in a regulated water bath. After incubation at the specified temperatures and time periods, infectivity assays were performed to detect infectious virus and to determine the TCID₅₀. Samples were also tested directly for residual reverse transcriptase activity.

Drying Conditions

One-milliliter aliquots of each dilution of HTLV-III (TM) were spread in 30×50 -mm culture plates and allowed to dry completely at 23 to 27°C (approximately 45 minutes). When fully dried, samples were covered and incubated at room temperature for 3, 6, 24, 72, and 168 hours. After the specified incubation period, samples were reconstituted in 1 mL of serum-free media and tested for residual reverse transcriptase activity and infectious virus.

Chemical Disinfectants/Inactivators

Chemicals were obtained from commercial sources: a combination of quaternary ammonium chlorides, ostyle-decyl-dimethyl ammonium chloride (1.536%), dioctyl-dimethyl ammonium chloride (0.768%), *N*-docyl-dimethyl ammonium chloride (0.768%), and alkyl-dimethyl benzyl ammonium chloride (12.288%), totaling 15% quaternary ammonium chlorides; alcohol; sodium hypochlorite; nonionic detergent P40 (Nonidet-P40); and alcohol and acetone. These were used at recommended concentrations to treat HTLV-III (H9) supplemented with 50% human plasma or HTLV-III-infected H9 cells for various times at room temperature (23 to 27°C). Infectivity assays were performed begin-

ning with a dilution of treated virus containing a nontoxic concentration of chemical, ie, one that did not interfere with cell growth and viability and/or virus replication. The concentrations of chemical used to treat HTLV-III (H9) were as follows: quaternary ammonium chlorides diluted 3 g/3.8 L of water (a final concentration of 0.08%); sodium hypochlorite diluted 1:10 in water (0.5% final concentration); nonidet-P40 diluted to 0.5% in isotonic buffer; alcohol diluted to 70% in water; and methyl alcohol and acetone mixed in equal proportions (1:1).

RESULTS

Serial dilutions of virus stocks were tested in an infectivity assay to quantify the amount of infectious virus present. A delay in the appearance of detectable reverse transcriptase activity and, in some instances, a reduction in the level of recoverable activity correlated with the decreasing concentrations of virus used for infection (Fig 1, top). The titer of HTLV-III (TM) was calculated to be approximately $7 \log_{10}$ TCID₅₀/mL. A similar pattern was obtained with the $\times 1,000$ concentrate of HTLV-III (H9), and the titer was determined to be approximately $10 \log_{10}$ TCID₅₀/mL (not shown). The relative sensitivity of the reverse transcriptase assay and the infectivity assay for HTLV-III/LAV are reflected in Fig 1, top. While undiluted supernatant fluids contained detectable reverse transcriptase activity (at time 0), infectious virus was detected at higher dilutions (10^{-1} through 10^{-6}). This emphasizes the need to continue cell cultures for an adequate time period to ensure the detection of low levels of virus used for infection.

To test the effect of some frequently encountered clinical and laboratory conditions on the infectivity of HTLV-III (TM), virus diluted in media supplemented with 50% human plasma was dried (Figs 1, center, and 2, top) and incubated at 23 to 27°C , or incubated in an aqueous state at one of several different temperatures: room temperature (23 to 27°C) (Table 1), 36 to 37°C (Table 1), and 54 to 56°C (Fig 1, bottom) for various periods of time. In a dried state, complete inactivation of virus (approximately $7 \log_{10}$ TCID₅₀) required between three and seven days, with an inactivation rate of approximately nine hours per log reduction

in titer (Fig 2, bottom). A low level of residual reverse transcriptase activity could be detected in the dried preparations only through the 24-hour incubation period at room temperature (Fig 1, center). Infectious, cell-associated virus in a dried state was detected in a dried preparation of H9-infected cells (5×10^6 cells) after 24 hours, but not after three days (Table 1).

Exposing virus to different temperatures resulted in a reduction of infectious virus corresponding to increasing times of incubation and increasing temperatures. Complete inactivation of $7 \log_{10} \text{TCID}_{50}$ or more of infectious virus was seen between 11 and 15 days of exposure at 36 to 37 °C (Table 1). Infectious virus was still detected after 15 days at room temperature (23 to 27 °C) (Table 1). Heating virus in 1 mL of medium containing 50% human plasma at 54 to 56 °C resulted in a reduction of virus titer at a rate of approximately 1 log reduction in TCID_{50} per 20 minutes (Figs 1, bottom, and 2, bottom). The infectious virus titer was reduced approximately $3 \log_{10} \text{TCID}_{50}$ after one hour, $6 \log_{10} \text{TCID}_{50}$ or more within three hours, and after five hours no infectious virus ($\geq 7 \log_{10} \text{TCID}_{50}$ reduction) was detectable. In contrast, no residual reverse transcriptase activity was detected in virus preparations after exposure to 30 minutes at 54 to 56 °C (time 0 points in Fig 1, bottom).

Several commonly used chemical disinfectants were also tested for their ability to inactivate HTLV-III (H9) at room temperature (23 to 27 °C). Sodium hypochlorite at a 0.5% concentration (common household bleach in 10% concentration in water) and alcohol at a 70% concentration inactivated infectious virus below detectable levels within one minute (a reduction of $\geq 7 \log_{10} \text{TCID}_{50}$). Quaternary ammonium chlorides at a concentration of 0.08% reduced virus titers to below detectable levels in less than ten minutes. Since nonionic detergents are routinely used for the preparation of viral proteins, the effect of nonidet-P40 on viral infectivity was also tested. Exposure of HTLV-III to 0.5% nonidet-P40 resulted in inactivation of virus (reduction of infectivity $\geq 8 \log_{10} \text{TCID}_{50}$) within one minute. A combination of

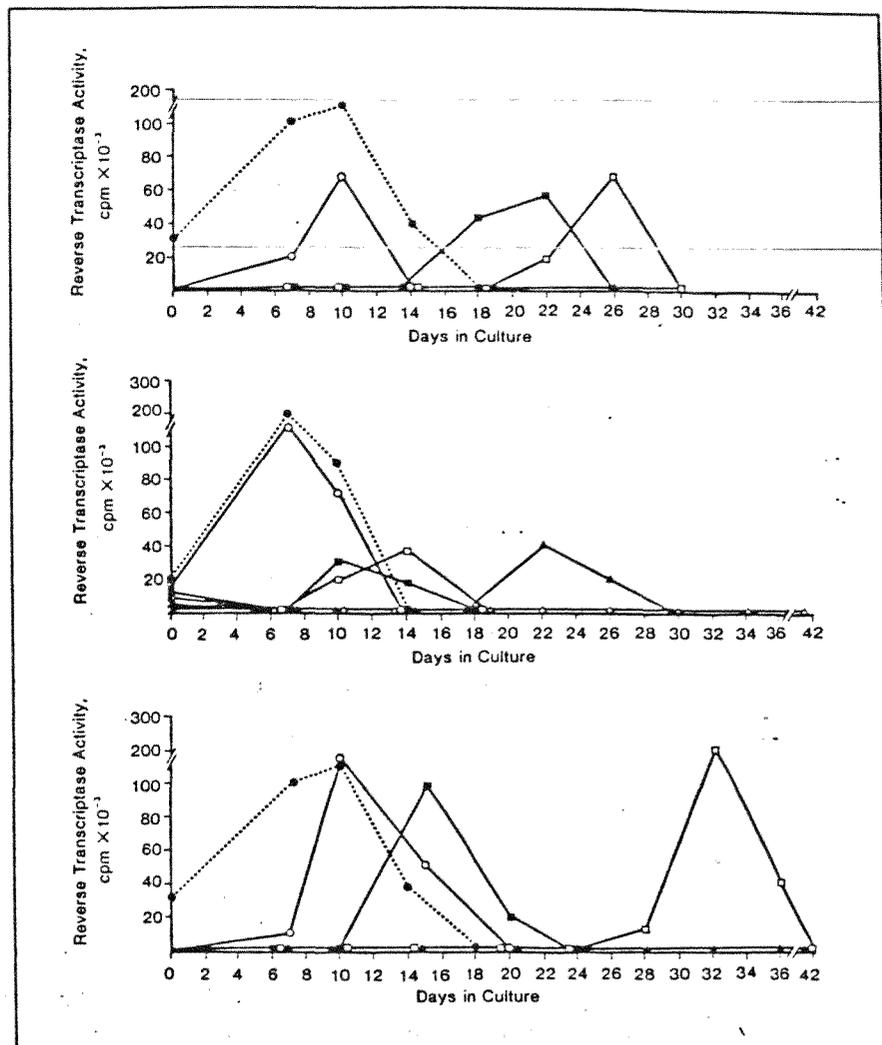


Fig 1.—Effect of sequential dilutions of untreated human T-cell lymphotropic virus type III (HTLV-III) (TM) (top) and exposure of undiluted HTLV-III (TM) to dried state (center) or 54 to 56 °C (bottom) on infectivity of normal human mononuclear leukocytes. Mononuclear cells from normal donors were prepared and infected with sequential dilutions of untreated or treated HTLV-III as described in "Methods" section. Top, Solid circles indicate undiluted; open circles, 10^{-2} dilution; solid squares, 10^{-4} dilution; and open squares, 10^{-6} dilution. Dilution of 10^{-8} yielded no detectable virus through 42 days in cell culture (not shown). Center, Solid circles indicate control; open circles, three hours; solid squares, six hours; open squares, 24 hours; solid triangles, 72 hours; and open triangles, 168 hours. Bottom, Solid circles indicate control; open circles, 0.5 hour; solid squares, one hour; open squares, three hours; and solid triangles, five hours.

Table 1.—Stability of Human T-Cell Lymphotropic Virus Type III (HTLV-III) After Exposure to Environmental Conditions*

Day	Cell Free		Cell Associated† (Drying [30 °C])
	23-27 °C (Room Temperature)	37 °C	
1	+	+	+
3	+	+	-
5	+	+	-
11	+	+	-
15	+	-	-

*After exposure of HTLV-III (TM) (titer of approximately $7 \log_{10}$ tissue culture infectious dose) to an indicated condition for the specified time period, infectivity assays were performed as described in the "Methods" section. Plus sign indicates that infectious virus was detected; minus sign, no infectious virus detected.

†One milliliter containing 5×10^5 HTLV-III-infected H9 cells was dried; after the specified time period, cells were reconstituted in 1 mL of serumless media, cocultivated with 5×10^7 normal peripheral blood mononuclear cells, and monitored for infectious virus as described in the "Methods" section.

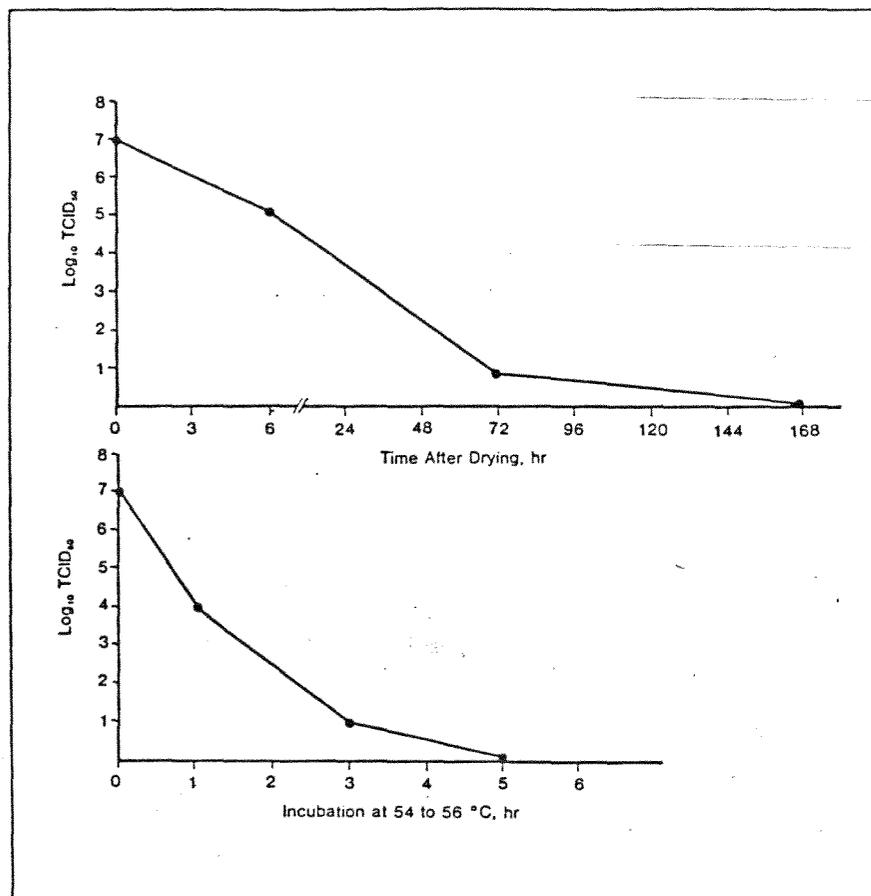


Fig 2.—Effect of storing of human T-cell lymphotropic virus type III (HTLV-III) (TM) in dried state at room temperature (24 to 27 °C) (top) and in aqueous solution at 54 to 56 °C (bottom) on titer of infectious virus. Mononuclear cells from normal donors were prepared and infected with sequential dilutions of HTLV-III (TM) preparations that were exposed to dried state and at 54 to 56 °C for variable periods of time as described in "Methods" section. Log₁₀ tissue culture infectious dose (TCID₅₀) was calculated using Reed-Muench method. Standard deviation was calculated to be ±0.513 log₁₀TCID₅₀.

Table 2.—Stability of Human T-Cell Lymphotropic Virus Type III (HTLV-III) (H9) After Exposure to Chemical Disinfectants

Chemical*	Final Concentration†	Exposure Time, min‡	Infectivity After Exposure, Log ₁₀ TCID ₅₀ §
Untreated virus (control)	+ 10.5
NP-40†	0.5%	1, 5, 10, 15	- <2.5
Sodium hypochlorite	0.5%	1, 5	- <3.5
Alcohol	70%	1, 5	- <3.5
Quaternary Ammonium chloride	0.08%	1	+ >4.5
		10	- <3.5
Alcohol-acetone	1:1	20	- -4

*Chemicals and viruses are described in "Methods" section.

†Virus preparations were mixed with the indicated final concentration of chemical and incubated for the specified times at room temperature (23 to 27 °C).

‡Time of exposure of the virus to the chemical.

§Infectivity assays were performed at a final dilution that avoided toxic effects on the cells, as described in the "Methods" section. Infectivity is expressed as log₁₀ tissue culture infectious dose (TCID₅₀) per milliliter of virus treated with the chemical disinfectants. Plus sign indicates virus detected; minus sign, no virus detected.

||Five × 10⁵ HTLV-III-infected H9 cells were fixed and air dried after the specified time period. Cells were reconstituted in 1 mL of serumless media, cocultivated with 5 × 10⁵ normal peripheral blood mononuclear cells, and monitored for infectious virus as described in the "Methods" section.

alcohol and acetone at concentrations routinely used to fix cells before testing for viral proteins also reduced the number of cells liberating infectious virus to below detectable levels. No virus was detected in HTLV-III-infected H9 cells treated for 20 minutes with a 1:1 mixture of alcohol-acetone (Table 2). In contrast, infectious virus can be recovered from fewer than 100 infected H9 cells, using the same cocultivation procedure (data not shown).

COMMENT

Human T-cell lymphotropic virus type III/lymphadenopathy-associated virus, in the presence of human plasma, was exposed to several environmental conditions encountered in natural, clinical, or laboratory settings. It should be emphasized that the concentration of virus used for these experimental studies (7 to 10 logs of viral activity) was many orders of magnitude above those commonly encountered from patient-derived specimens. However, it is important not to ignore any potential implications regarding possible transmission of virus by contaminated needles and syringes or in clinical situations involving contact with patient tissues or body fluids.

Infectious cell-free virus could be recovered from dried material after up to three days at room temperature, and in an aqueous environment, infectious virus survived longer than 15 days at room temperature (23 to 27 °C) and 11 days at 36 to 37 °C. Even under the more rigorous heating conditions commonly used to inactivate complement (54 to 56 °C), infectious virus was detected after three hours of exposure. The approximate rate of HTLV-III inactivation observed, about 1 log₁₀TCID₅₀/20 min, is much slower than previously reported, ie, inactivation of HTLV-III/LAV after 30 minutes¹³ or within ten minutes^{16,17} at 54 to 56 °C.

It is not known why an almost tenfold difference in the apparent rate of inactivation at 54 to 56 °C was found. It appears that the rate of inactivation determined herein more closely approximates that reported for 50 °C in a previous report.¹⁷ These data emphasize the necessity of taking into account initial virus titers and the effect of different experimen-

tal conditions (eg, volumes used, supplements added, and the types of assays used) before reaching a conclusion as to the effectiveness of an inactivation procedure. The stability of HTLV-III at 54 to 56 °C suggests that the inactivation of virus in blood products (eg, antihemophilia factors) could require more extensive treatment, as has been suggested.¹⁷

An important conclusion from these investigations is that monitoring residual viral reverse transcriptase activity is not a reasonable alternative to tests for infectious virus.¹⁸ In fresh preparations of high titer of virus, the level of viral enzyme activity roughly parallels the quantity of infectious virus. However, the ability to detect viral reverse transcriptase activity is rapidly lost on dilution (Fig 1, top) or treatment of virus. For example, at 54 to 56 °C, the level of viral reverse transcriptase activity

rapidly decreased to below detectable levels within 30 minutes, whereas infectivity assays detected virus for a much longer period of time.

It is clear from these and other^{16,17} studies that infectious HTLV-III/LAV can be present after exposure to a number of environmental conditions encountered in a laboratory and/or clinical setting. Fortunately, HTLV-III/LAV behaves similarly to other enveloped retroviruses in its sensitivity to chemical disinfectants and detergents.^{16,18,19} We found 0.5% sodium hypochlorite (10% solution of household bleach), 70% alcohol, or 0.5% nonidet-P40 to completely inactivate HTLV-III within one minute of exposure.¹⁸ Also, a combination of quaternary ammonium chlorides (0.08%) completely inactivated 7 log₁₀TCID₅₀ or more of infectious virus within ten minutes. Fixation of infected cells with alcohol and ace-

tone also abolished the ability to recover virus within 20 minutes of exposure.

Laboratory personnel who come into contact with HTLV-III/LAV-contaminated materials, especially concentrated preparations, should be aware that infectious virus can persist in a liquid or dried state for prolonged periods of time, possibly even at elevated temperatures. A thorough cleansing of contaminated surfaces, utensils, and equipment with commonly used disinfectants, however, is sufficient to inactivate the virus. As more is learned regarding the stability of HTLV-III/LAV, a rational basis for prevention of its accidental spread can be formulated.

This investigation was supported in part by a grant from the Key Pharmaceuticals Medical Research Foundation, Inc, Miami, Fla.

References

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Disinfection and Inactivation of the Human T Lymphotropic Virus Type III/Lymphadenopathy-Associated Virus

The purpose of this study was to investigate inactivation of human T lymphotropic virus type III/lymphadenopathy-associated virus (HTLV-III/LAV) by reagents and conditions commonly used in laboratories. A sensitive and quantitative bioassay for infectious virus was used to evaluate virus inactivation. Both the observed reduction in titer of infectious virus after exposure to disinfectants (interpreted by comparison with appropriate controls) and em-

pirical estimates of efficacy derived by extrapolation from dose-response plots were used as indicators of inactivation of the virus. The results indicate that alcohols, hypochlorite, the detergent NP-40 (but not Tween-20), H₂O₂, phenolics, and paraformaldehyde are all effective inactivators of HTLV-III/LAV at concentrations well below those usually formulated for use as a disinfectant or in the laboratory.

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The use of trade names and commercial sources is for identification only and does not imply endorsement by the Public Health Services or the U.S. Department of Health and Human Services.

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Materials and Methods

Virus and virus propagation. HTLV-III/LAV was propagated in phytohemagglutinin-stimulated normal human lymphocytes (PHA blasts) that were cultured in RPMI 1640 containing 100 U of penicillin/ml, 50 µg of streptomycin/ml, 2 mM l-glutamine (GIBCO, Grand Is-

land, NY), 10% fetal calf serum (GIBCO), and 10% interleukin-2 (Cellular Products, Buffalo, NY) as previously described [1]. Stock virus preparations were obtained from culture supernates that were harvested when virus levels had peaked (7-9 days), as determined by reverse transcriptase activity and immunoassay for viral antigens [1, 2]. Virus inocula were stored as aliquots of 0.5-1.0 ml in liquid nitrogen.

Assay for 50% infectious dose. The microculture assay for the titration of infectious HTLV-III/LAV has been described [1]. Briefly, PHA blasts are inoculated with serial 10-fold dilutions of HTLV-III/LAV inoculum and incubated for 18 hr at 37 C in an atmosphere of 6% CO₂. The cells are then washed and plated in microculture (10 cultures per dilution; 1 × 10⁵ cells per culture in 0.25 ml of the media described above). On day 4, 100 μl of culture supernate is removed and replaced with fresh media. On day 8 supernates are assayed for virus with an antigen capture assay [1]. Infectious virus titer (ID₅₀) is defined as the reciprocal of the dilution at which 50% of the cultures are positive [1, 3].

Inactivation. The following proposed inactivators were tested: isopropyl rubbing alcohol (70%; Custom Laboratories, Baltimore), ethyl alcohol, absolute alcohol (Aaper Alcohol and Chemical Co., Shelbyville, Ky), NP-40 (Sigma, St. Louis), household bleach (which is formulated as 5.25% NaOCl), Tween-20 (Sigma), paraformaldehyde (methanol free; Polysciences, Warrington Pa), Lysol[®] (active ingredients—soap, 16.5%; *o*-phenyl phenol, 2.8%; *o*-benzyl-*p*-chlorophenol, 2.7%; alcohol, 1.8%; xenols, 1.5%; isopropyl alcohol, 0.9%; and EDTA, 0.76%; Sterling Drug, Montvale, NJ), and H₂O₂. The concentration of H₂O₂ was determined by measuring the OD at 230 nm and calculating from the data that a 0.03% solution gives an extinction of 0.640 at 230 nm (1-cm light path)[4]. Stock virus (50 μl) was treated with 50 μl of inactivator diluted in normal saline at room temperature (21-25 C) for 2-10 min. Treated virus was then serially diluted in media and inoculated into indicator cells, and the ID₅₀ was determined. Paraformaldehyde treatment was modified so that the virus and agent were incubated for 10 min, followed by the addition of 100 μl of fetal calf serum and another 15-min incubation. For all chemical disinfectants, inoculation conditions (1 part inactivator in saline:1 part virus inoculum in media) at the effective concentrations were in a neutral pH range. In the pH experiments, virus was treated for 10 min with either 0.1 N NaOH or 0.1 N HCl to obtain the desired pH, after which the pH was adjusted to neutrality. When virus was incubated at 56 C, it was first diluted 1:10 in AB+ human serum that was negative for antibody to HTLV-III/LAV.

For toxicity controls, separate tubes of virus and inactivator were first serially diluted and then inoculated together into cell cultures so that the final concentrations of virus and agent were identical to those in the inactivation assay. A more descriptive rationale and the validity

of this type of toxicity control has been published [1]. All experiments were performed at least twice. As indicated in the text, some concentrations of inactivators were further evaluated with two additional subcultures of culture supernates harvested at 8-10 days. One hundred microliters of supernate was removed from each of the 10 microcultures, pooled and reinoculated into PHA blasts as described above, and monitored for virus replication for a total of 24-26 days.

Results

pH. The HTLV-III/LAV virus was inactivated by exposure to both low and high pH (figure 1). High pH was tolerated somewhat better by the virus than was low pH.

Heat. Virus was diluted in human serum to stimulate any protection provided by serum proteins and then heated to 56 C. Titer of virus dropped from 10^{5.15} to undetectable (<10¹) within 10 min. Human complement has no effect on this virus. ID₅₀ titers of inoculum incubated at 37 C for 1 hr in 90% human serum or serum that had been heat-inactivated at 56 C for 30 min were identical.

Chemical disinfectants. All reagents tested, except Tween-20 (2.5%) were effective inactivators. The concentrations of various disinfectants resulting in "total" inactivation of virus are given in table 1. These were the lowest concentrations we tested in which the ID₅₀ was unmeasurable (<10¹), in which no cultures at any dilution were positive, and in which virus was not recovered by additional subculture with fresh PHA blasts. The controls for toxicity at these concentrations resulted in ID₅₀ titration endpoints that were the same as that of untreated vi-

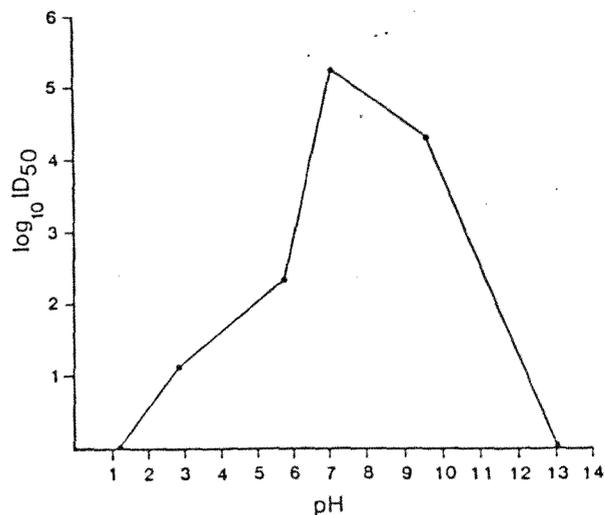


Figure 1. Inactivation of HTLV-III/LAV by extremes of pH. HTLV-III/LAV inoculum was adjusted to the indicated pH. After 10 min, the inocula were neutralized and serially diluted, and ID₅₀ determinations were performed.

Table 1. Inactivation of HTLV-III/LAV.

Inactivator	Concentration (%)	ID ₅₀ in untreated	ID ₅₀ after treatment	Commonly used concentrations (%)	Expected log reduction†
H ₂ O ₂	0.3	10 ^{8.00}	<10 ¹ **	3	39
Ethyl alcohol	50	10 ^{4.52}	<10 ¹	95	18
Isopropyl alcohol	35	10 ^{4.78}	<10 ¹	Not calculated	
Paraformaldehyde	0.5	10 ^{8.00}	<10 ¹	1	15
Lysol	0.5	10 ^{4.71}	<10 ¹	3	36
Household bleach	0.1	10 ^{9.24}	<10 ¹	10	1,402
Nonidet P-40	1.0	10 ^{4.78}	<10 ¹	0.5	4
Tween-20	2.5	10 ^{8.0}	10 ^{8.0}	1	0

* ID₅₀ of <10¹ means that no measurable ID₅₀ was obtained after treatment, that no cultures at the first dilution tested (10⁻¹) were positive, and that virus was not detected with two additional subcultures of cultures containing treated virus.

† Calculated by using linear regression analysis of plots of concentration vs. log₁₀ ID₅₀.

rus inoculum. Thus, the observed reduction in titer is the difference between untreated control ID₅₀ and the lower limit of the assay (10¹ ID₅₀). Results obtained with these inactivators were reproducible, except in the case of isopropyl alcohol. In four of six experiments, complete inactivation was found after treatment with a 21% solution, whereas a 35% solution was required for complete inactivation in the other two.

For all the chemical inactivators, a plot of log₁₀ ID₅₀ vs. concentration (expressed as a linear value) gave the best fit to a straight line by linear regression ($r \geq .93$). Mathematical formulae expressing log₁₀ ID₅₀ as a linear function of concentration were derived from data generated in the measurable range and were used to extrapolate to the nonmeasurable range. The log reductions in virus titer expected with commonly used concentrations of the disinfectants were calculated (table 1).

Discussion

The retroviruses have been classified by Klein and Deforest [5] as protein and lipid viruses that are susceptible to many disinfectants, such as 40% ethyl alcohol, 1% Lysol, 30% isopropyl alcohol, 5% phenol, 2% formalin, and 200 ppm sodium hypochlorite. Spire and coworkers [6] measured reduction in reverse transcriptase activity after virus had been treated with inactivators and reported that the HTLV-III/LAV is inactivated by 0.02% NaOCl, 1:400 β-propiolactone, 0.01% glutaraldehyde (95% inactivation), 25% ethanol, and 30 mM NaOH. Formalin at 0.1% was found to reduce reverse transcriptase activity, but complete inactivation was not achieved after 2 hr of exposure. We measured reduction in infectivity titer after treatment with inactivators, and these results are also consistent with the susceptibility classification of Klein and Deforest [5]. In preparations with pretreatment titers of ~10⁸ HTLV-III/LAV was undetectable (<10¹) after treatment with 50% ethyl alcohol, 35% isopropyl alcohol, 0.1% household bleach (52.5 ppm NaOCl), 1.0% NP-40, 0.5% Lysol, 0.5%

paraformaldehyde, and 0.3% H₂O₂. Virus was also susceptible to extremes in pH (pH 1 and 13) and to heating in the presence of serum at 56 C for 10 min.

The ID₅₀ assay has several advantages for this type of study. First and foremost, an estimation of virus infectivity is desirable. Second, the ID₅₀ assay is measured over a greater range than the 1- or 2-log range in the reverse transcriptase or antigen-capture assay. Finally, the ID₅₀ assay is several orders of magnitude more sensitive than are either the reverse transcriptase or antigen-capture assays [1]. However, the relation between the lower limits of sensitivity for infectious virus in this assay and infectious dose for humans is unknown. The only information we have about this is that one chimpanzee inoculated with a dose of 1,120 ID₅₀ developed viremia within three weeks; another chimpanzee given the same inoculum at a dose of 0.1 ID₅₀ has not developed viremia or seropositivity after 4 months of follow-up [7].

Concentration, exposure time, temperature, and matrix are determinants of inactivation by disinfectants. We studied inactivation of virus in a liquid matrix of culture media containing 10% fetal calf serum over a range of concentrations of inactivators, maintaining time and temperature within a certain range. The conditions of time (2-10 min) and temperature (21-25 C) may reasonably apply to many situations in which disinfectants are used. For most applications, disinfectants are used in sufficiently large volumes relative to virus-containing materials to dilute or overcome any protective effect of matrix materials. The disinfectants we studied are commonly used at concentrations several times greater than that required for virus inactivation in our assay system, which provides an added margin of safety. For instance, bottled bleach is formulated as 5.25% NaOCl; however, NaOCl may decay and our results may underestimate the true efficacy of bleach in terms of NaOCl concentration. In any event, the usual concentration of bleach used by laboratories (10%) is two orders of magnitude greater than the minimal effective concentration.

Our results can reasonably be applied to dried virus, provided that disinfection procedures result in penetration of disinfectant into dried material or cause dissolution or suspension of the virus into disinfectant. Use of these data to support some other applications, however, may be more tenuous. For instance, although 0.5% paraformaldehyde inactivates virus when free in solution, we do not know if it penetrates cells or tissues sufficiently to inactivate intracellular virus. We are currently evaluating this problem. Since the AIDS epidemic began, we have used a 10% solution of bleach as our primary surface disinfectant, as recommended by the Centers for Disease Control [8]. Our technical staff has a cumulative 5-days-a-week, 22 person-year experience with handling blood, cells, and sera from AIDS and AIDS-related subjects (and, more recently, with cell cultures known to be infected with HTLV-III/LAV). It is reassuring that there have been no seroconversions to positivity for antibody to HTLV-III/LAV. Whether this is because of or in spite of the use of disinfectants, other recommended precautions for handling potentially infectious material [8], the low infectivity of the virus, or requirement for parenteral exposure to the virus is, of course, unknown. It is also reassuring to know that NP-40, a detergent used in the preparation of disrupted virus for serological assays, is an effective disinfectant. Unfortunately, Tween-20, a common component of buffers used in serology, is not an effective inactivator. Sera can be decontaminated by heating at 56 C without loss of serological (antibody) activity. We hope these data will be of some use to laboratory personnel and others who are concerned with potential exposure to the AIDS virus.

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The Effect of Placebo and Virucidal Paper Handkerchiefs on Viral Contamination of the Hand and Transmission of Experimental Rhinoviral Infection

Treatment of paper handkerchiefs with virucidal compounds has been shown to prevent the passage of viable rhinovirus through the tissue when virus was pipetted onto the superior side of tissue draped over a petri dish [1]. On the ba-

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Informed consent was obtained from patients, and the guidelines for human experimentation of the University of Virginia Human Investigation Committee were followed in the conduct of this research.

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sis of this *in vitro* work, however, it was not clear whether treated tissues would be similarly successful in blocking the passage of virus during forceful deposition of contaminated nasal mucus, such as that which occurs with repeated nose blowing. This report describes studies with volunteers employing a model (self-inoculation following contamination of the hand) for transmission of experimental rhinoviral colds. The purpose of these studies was to determine whether nasal tissues treated with placebo or virucidal compounds could prevent viral contamination of the hand following nose blowing and, thus, interrupt hand-to-hand transmission of experimental rhinoviral infections. This was considered a necessary step before proceeding to a large-scale field trial with virucidal tissues in the home.