

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF CONFIRMING THE	)	RESOLUTION NO. 81-289
APPOINTMENT OF THE DEPUTY	)	
EXECUTIVE OFFICER	)	Introduced by the Council
	)	Coordinating Committee

WHEREAS, The Personnel Rules adopted by the Council require that the Council confirm the appointment of a candidate to the position of Deputy Executive Officer; now, therefore,

BE IT RESOLVED,

That the appointment of Don Carlson is confirmed by a majority of the Metro Council.

ADOPTED by the Council of the Metropolitan Service District this 3rd day of December, 1981.

  
Presiding Officer

RG/srb  
4542B/283  
11/09/81

A G E N D A   M A N A G E M E N T   S U M M A R Y

TO: Metro Council  
FROM: Executive Officer *RLC*  
SUBJECT: Confirming the Appointment of the Deputy Executive Officer

I. RECOMMENDATIONS:

- A. ACTION REQUESTED: Recommend approval of the attached Resolution for the purpose of confirming the appointment of Don Carlson, a candidate for the position of Deputy Executive Officer.
- B. POLICY IMPACT: The recommendation is consistent with the Personnel Rules, which require Council to confirm this position.
- C. BUDGET IMPACT: The FY 1982 Metro budget includes funds to support this position.

II. ANALYSIS:

- A. BACKGROUND: Article 2, Sec. 8 E of the Metro Personnel Rules requires confirmation by a majority of the Council of a candidate considered for the position of Deputy Executive Officer prior to appointment. This position was approved in the FY 1982 budget and provides support to the Executive Officer in administering Metro's internal organization and in the formulation of policy.
- B. ALTERNATIVES CONSIDERED: Over 100 applications were received for this position and interviews took place over a three-month period. After preliminary screening, several candidates were interviewed by a Committee consisting of Rick Gustafson, Executive Officer, Councilor Mike Burton, and Dick Davis, Assistant Vice President, Pacific Northwest Bell.

The Committee agreed that Don Carlson met the necessary criteria and would work effectively with the Executive Officer, the Council and Metro staff.

- C. CONCLUSION: Approve the appointment of Don Carlson as Deputy Executive Officer.

RG/srb  
4542B/283  
11/09/81



**METROPOLITAN SERVICE DISTRICT**  
527 S.W. HALL ST., PORTLAND, OR. 97201 • 503/221-1646

an equal opportunity employer

Recruiting for: DEPUTY EXECUTIVE OFFICER 095

SALARY: \$33,717-\$41,091

DUTIES: Under the general direction of the elected Executive Officer and subject to pertinent laws and Council policies, directs Metro's internal organization and assists the Executive Officer and Council in the formulation of policy. Performs the Executive Officer's functions in his/her absence.

QUALIFICATIONS: Knowledge of: work planning techniques; urban planning techniques; local, state and federal planning laws; finance and budget, grant and general management techniques; personnel administration; and political decision-making process.

Ability to: work effectively with a political decision-making body; create and innovate alternative solutions to problems facing a political decision-making body; manage a diversified organization operation involving the management of work programs, budgets and personnel; carry out the policies and programs of a policy setting body; work effectively with subordinates, the Executive Officer, Council and other elected officials, representatives of other governmental agencies, business and civic groups and the general public in carrying out the work of the agency; interrelate with all levels of public officials and speak and write effectively.

Possession of a Bachelor's degree in Urban Planning, Economics, Business, Public Administration or similar field and six years of experience in a high level management position with experience in organizational management and operations, personnel and labor relations, public budgeting and finance, and public relations or a Master's degree and four years of experience in a related field.

\* Subject to change after cost of living adjustment is determined.

**SUPPLEMENTAL  
REQUIREMENT:**

All applicants are required to submit a brief written statement in response to the following three questions as a part of the application form:

1. Please describe your administrative experience and style of management.
2. Please describe your experience in working with the private sector on projects or matters involving development.
3. Please describe your experience in working for the public sector or working with officials of the public sector.

**APPLY:**

Deliver completed application form to the Personnel Officer, Metropolitan Service District, 527 S.W. Hall Street, Portland, OR 97201.

**LAST FILING DATE:**

Open until a sufficient number of applications are received. Recruitment may be closed without further notice.

SW:cjv

# Donald E. Carlson

Address: 6555 SE 34th Avenue  
Portland, OR 97202

Telephone: 771-7623 (home)  
229-5307 (work)

Date of birth: February 25, 1941

Marital status: Married Darlene M. Kroll  
June 18, 1963  
Two children - Leslie 16  
Christopher 12

## EDUCATION

Syracuse University, Maxwell School of Citizenship & Public Affairs,  
Syracuse, New York. Masters Degree in Public Administration, 1964.

Linfield College, McMinnville, Oregon. B.A. in Political Science, 1963.

## EMPLOYMENT

Portland Metropolitan Area  
Local Government Boundary  
Commission, Portland, Oregon

Executive Officer (Jan. 1973 - present).  
Director of 11 member citizens' commission  
appointed by Governor. Achieved  
significant staff work at minimal budgeted  
cost by effectively utilizing CETA program,  
motivating staff. Directed agency in  
period of rapid expansion in workload  
involving a 2½ fold increase in proposals.  
Responsible for administration of state  
statutes governing boundary changes, for  
preparation and execution of agency budget,  
and for hiring, training, and termination  
of employees.

Portland Metropolitan Area  
Local Government Boundary  
Commission, Portland, Oregon

Administrative Analyst (Jan. 1970 -  
Dec. 1972). Researched and wrote staff  
reports on proposals; drafted Commission  
Final Orders; prepared documents for  
distribution to state legislators and  
local government officials.

Portland Metropolitan Study  
Commission, Portland, Oregon

Research Associate (March 1968 - Dec. 1969).  
Principal staff analyst to Commission.  
Staffed Intergovernmental Cooperation  
Committee during successful merger of  
City of Portland and Multnomah County  
Health Departments.

Bureau of Governmental Research  
and Service, University of  
Oregon, Eugene, Oregon

Research Assistant (August 1964 - Feb. 1968).  
Director of Bureau's Portland City  
Hall Office. Provided information and  
assistance to local government officials  
and agencies in Portland Metropolitan Area.

Linfield College,  
McMinnville, Oregon

Instructor (Sept. 1967 - Jan. 1968).  
Taught course entitled, "Introduction to  
Public Administration".

#### PROJECTS AND ACTIVITIES

Currently elected member of Board of Directors of the Eastmoreland  
Neighborhood Association.

Manager, 1978 Mt. Hood Little League Senior Girls All Star Softball  
Team.

Group facilitator, Creative Initiative Foundation, non-profit  
educational foundation, 1970 - 1977.

#### PROFESSIONAL AFFILIATIONS

American Society for Public Administration, Oregon Chapter.

Western Governmental Research Association, State Representative 1976-77.

References available on request

September 2, 1981

Rick Gustafson  
Executive Officer  
Metropolitan Service District  
527 SW Hall Street  
Portland, Oregon 97201

Dear Rick:

Thanks for the information regarding application requirements for the Deputy Executive Officer position. Please find attached my response to the questions listed in the "Supplemental Requirements" section of the announcement.

I look forward to further discussing this position with you in the near future. If you need additional information, please let me know.

Sincerely,



Donald E. Carlson  
6555 SE 34th Avenue  
Portland, Oregon 97202

SUPPLEMENTAL REQUIREMENT

Donald E. Carlson

September 2, 1981

1. Please describe your administrative experience and style of management.

My administrative experience began immediately after graduate school when I accepted a position as Research Assistant with the Bureau of Governmental Research and Service with the University of Oregon. I was placed in charge of the Bureau's Portland office and had the responsibility to set up the office, hire and supervise a part-time secretary and establish a work program. The purpose of the office was to conduct research projects of interest to local government in the Portland metropolitan area and through partial funding from the League of Oregon Cities to provide research assistance to the Portland City Commissioners. Projects initiated and conducted by me led to the following Bureau publications:

Municipal Water and Sewerage Service in the Tri-County Area,  
Bureau of Governmental Research and Service, University of  
Oregon, 1965.

Local Intergovernmental Cooperation in the Tri-County Area,  
Bureau of Governmental Research and Service, University of Oregon,  
1966,

In addition, in response to requests from the former City Commissioner of Public Works, Bill Bowes, I conducted projects which led to publication of the following memoranda:

"Memorandum on the Municipal Regulation of Manned Newstands and Newspaper Coin Boxes", Bureau of Governmental Research and Service, 1965.

"Memorandum on Underground Utility Placement Patterns and Use of Precast Structures in Underground Utility Construction", Bureau of Governmental Research and Service, 1967.

My next work experience was with the Portland Metropolitan Study Commission. While I did not have any direct supervisory role over personnel, I did have responsibility for managing the work of the Commission's Intergovernmental Cooperation Committee. The work of this citizens' committee led to the successful contractual merger of the City of Portland and Multnomah County Health Departments. We also instigated the merger of the City and County Planning Departments. Memoranda prepared by me for this committee included:



"Report of the Chairman of the Intergovernmental Cooperation Committee on Proposed Merger of City and County Health Departments," Portland Metropolitan Study Commission, March 7, 1968.

"Additional information on City of Portland and Multnomah County Planning Commissions and Departments," Portland Metropolitan Study Commission, May 8, 1968.

"Differences between the City and County in the Functional Area of Planning and Zoning," Portland Metropolitan Study Commission, August 8, 1969.

"Alternatives for Merging or Consolidating City and County Planning Commissions and Staffs," Portland Metropolitan Study Commission, October 7, 1969.

My principal administrative experience has been gained with the Portland Metropolitan Area Local Government Boundary Commission. As Executive Officer for the past 9 years, I have been responsible for managing the Commission's program. Specific responsibilities have been the recruitment, hiring, and supervision of staff which has varied in size from 4 to 8 persons; preparation and implementation of the Commission's work programs and budget; development of policies and procedures for smooth and expeditious processing of boundary changes; preparation and lobbying for the Commission's legislative program; representing the Commission at various meetings of citizens and civic groups.

Accomplishments include: hiring and training of core staff of four people which has an accumulated experience of 37 years with the Commission; handling a 2 1/2 fold increase in case load with core staff and no increase in processing time and improving the quality of the staff reports; reduction in number of governmental units in the Portland Metro area under the Commission's jurisdiction from approximately 300 in 1969 to 120 in 1981; initiating or assisting on the following special projects:

National Study of Two Tiered Metropolitan Government.

Sponsored by the National Academy of Public Administration Foundation. Supervision of the grant application entitled "Proposal to participate in a National Study of Two Tiered Metropolitan Government." Supervision of the on-site interviews of the national selection panel. June 1975 to December 1975. Effort culminated in selection of Portland Metropolitan area for \$100,000 study grant and eventual establishment of Tri-County Local Government Commission.

The Oak Lodge Study Sponsored by the Portland Metropolitan Area Boundary Commission. Supervision of a study of local government services and structure in the Oak Lodge area of Clackamas County. Study conducted by two member professional

staff in conjunction with local citizens committee. Numerous reports prepared and printed. September 1977 to November 1978.

The Cedar Hills Study. Conducted by the Portland Metropolitan Area Boundary Commission at the request of the Cedar Hills Homes Association. Supervision of a study of fiscal, organizational and service impacts of annexation to the City of Beaverton. Study conducted by two member staff in conjunction with a local citizens' committee. Numerous reports prepared and printed. June 1979 to October 1979.

The North Clackamas-Milwaukie Consolidation Study. Conducted by the Portland Metropolitan Area Boundary Commission at the request of the North Clackamas Special Districts. January 1980 to March 1980.

My most recent focus has been on the survival of the Boundary Commission. We have managed to keep processing proposals in a timely and orderly fashion and withstand gubernatorial and legislative efforts to abolish the Commission. Local government and legislative support has been mustered to retain the Commission as a viable agency. I am now in the process of managing the transition of the Boundary Commission from a state funded state agency to a locally funded state agency.

\* \* \* \* \*

One of the most rewarding and valuable experiences in my years with the Boundary Commission has been the professional relationship I have enjoyed with the commissioners, both as a group and individually. I have worked for approximately fifty commissioners with different backgrounds and points of view. I have been well received, and my work appreciated and praised. The Commission has certainly not always followed staff recommendations, but they have always been provided with accurate and complete information with which to make a decision. We have respected one another and worked hard to achieve fair and rational public decisions. They have been supportive and loyal through the most trying times.

My management style is largely based on two basic principles, one external and the other a personal characteristic. It has been my experience that people want something meaningful to do. I personally want to make a difference, make a positive contribution in my work, and so do most people. I think this is a basic fact which should be understood by all managers. In addition, a personal characteristic of mine is that I like people. I respect them, their individuality, different points of view. I trust them.

In managing the affairs of the Commission, I encourage my individual staff members to identify with the goals and purpose of the Commission. This has been done by giving them opportunities to explain the work of the agency to individuals and groups, by assigning cases to them which they are totally responsible for, including active participation with the Commission at public hearings.

I encourage staff members to participate in decisions which affect the agency. I value highly good dialogue with staff. This is particularly important in policy decisions or interpretations of statutes which will affect staff recommendations to the Commission.

I encourage staff members to assume greater amounts of responsibility in their particular area of work. I encourage them to make the most of their specific job so they will continue to "grow" in and with the agency.

I assign work through consultation with staff and monitor it closely. When errors or omissions are made, I require the staff to make corrections or to "dig a little deeper" for maximum learning. When a job is well done, I give positive reinforcement.

I attempt to be open and accessible to my staff for advice and critique. If something is bothering someone, I want it expressed and discussed and a resolution reached. When personnel problems or behavior patterns occur which are detrimental to the functioning of the agency, I attempt to confront the matter directly with those involved. I will give a person a chance to correct the behavior and improve the situation.

I expect my staff to be rigorous in their tasks and to always give their very best.

2. Please describe your experience in working with the private sector on projects or matters involving development.

A great deal of the Boundary Commission's work deals with private individuals and companies on projects or matters involving development. Most of the boundary change proposals (as of 8/24/81 we have considered 1,750 proposals) are initiated by property owners who wish to develop their property in some manner. I have worked personally with individuals desiring to develop a single lot and representatives of large development concerns, including residential, commercial and industrial developers. My initial task usually is to clearly explain to developers the boundary change process and the difficulties they might encounter either from community groups or interjurisdictional difficulties. We are aware of whether or not the specific jurisdictions can provide an adequate quantity and quality of services. Many of these contacts occur prior to any proposal being initiated. Once a proposal is initiated, we attempt to inform a developer as soon as possible if we (staff) have concerns about the proposal. It is my point of view that any property owner or developer should have as much time as possible or opportunity to make his case to staff or the Commission. It is our responsibility to clearly state deficiencies or problems with the proposal so answers or the right information can be obtained.

Within the past two years, the staff of the Boundary Commission has served individual developers and the development community by guiding them through the boundary change portion of the development process. This is particularly true for proposals within the Urban Growth Boundary where conflicts between governmental jurisdictions and community planning groups are increasing. There are an increasing number of "turf" battles occurring which have very little to do with the proposed development but occur at the time a boundary change is proposed. I have attempted to resolve the dispute or provide information to make a decision which will assist the change to occur so development can take place in an orderly fashion. My viewpoint has shifted in the instances of proposals within the Urban Growth Boundary from that of a "regulator" to one of "helper." An example of this is my recent experience mediating a conflict between the City of Gresham and the Lusted Water District. At the request of the Metropolitan Homebuilders Association, I facilitated the negotiation of a contract between both jurisdictions which led to the withdrawal of the area under dispute from the district by the city. The city took over the lines and responsibility for serving the area but continued to buy water from the district which assures their viability. Without the amicable resolution of the dispute, a moratorium on new construction in the area would have continued much to the detriment of orderly development in the region.

3. Please describe your experience in working for the public sector or working with officials of the public sector.

Much of the answer to this question is included in the answers to the previous two questions. It should be noted that because of the nature of the boundary change process, I have come in contact with many public officials in this region. It is not unusual for the issues involved in a boundary change to cut across local, regional, state and occasionally federal levels, thus necessitating contact with officials at all points. Included are contacts with elected officials and staff. The contact with local elected officials has involved for the most part discussions of the purpose, policies and procedures of the Commission. Some contacts have been in an effort to gain local support for the continued operation of the Commission. Contacts with local, regional, state and federal bureaucrats mostly involve the garnering of information from the agency affected by a boundary change. I have dealt with EPA officials in Portland and Seattle regarding federal funding policies for sewers; Farmers Home Administration regarding funding for water systems. Our principal state agency contacts have been with DEQ, Health Division, Department of Land Conservation and Development, and the Department of Transportation. Regional agency contacts are principally Metro and occasionally with Tri-Met and the Port of Portland. We are in daily contact with local government officials regarding the services provided by specific jurisdictions. For the most part, the contacts made and relationships developed with various public officials have been good, useful and mutually beneficial.

The relationships are good, from my point of view, because I value and respect those people and institutions and the services they provide. During the past four years I also have made numerous contacts with state legislators to provide information on the purpose and function of the Commission. Again, the relationships developed have been for the most part good.

Res 81-289

AGENDA MANAGEMENT SUMMARY

TO: Council Coordinating Committee  
FROM: Executive Officer *RLB*  
SUBJECT: Confirming the Appointment of the Deputy Executive Officer

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- B. ALTERNATIVES CONSIDERED: Over 100 applications were received for this position and interviews took place over a three-month period. After preliminary screening, several candidates were interviewed by a Committee consisting of Rick Gustafson, Executive Officer, Councilor Mike Burton, and Dick Davis, Assistant Vice President, Pacific Northwest Bell.

The Committee agreed that Don Carlson met the necessary criteria and would work effectively with the Executive Officer, the Council and Metro staff.

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