

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE FY 2021-22 BUDGET AND APPROPRIATIONS SCHEDULE, AND FY 2021-22 THROUGH FY 2025-26 CAPITAL IMPROVEMENT PLAN TO PROVIDE FOR CHANGES IN OPERATIONS)	RESOLUTION NO 21-5203
)	
)	Introduced by Marissa Madrigal, Chief Operating Officer, with the concurrence of Deputy Council President Shirley Craddick
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WHEREAS, the Metro Council has reviewed and considered the need to change appropriations within the FY 2021-22 Budget; and

WHEREAS, Metro Code chapter 2.02.040 requires Metro Council approval to add any new position to the budget; and

WHEREAS, the need for the change of appropriations has been justified; and

WHEREAS, adequate funds exist for other identified needs; and

WHEREAS, ORS 294.463(1) provides for transfers of appropriations within a fund, including transfers from contingency that do not exceed 15 percent of a fund’s appropriations, if such transfers are authorized by official resolution or ordinance of the governing body, and

WHEREAS, ORS 294.463(3) provides for transfers of appropriations or of appropriations and a like amount of budget resources between funds of the municipal corporation when authorized by an official resolution or ordinance of the governing body stating the need for the transfer, and

WHEREAS, ORS 294.338(2) allows an increase in appropriations due to specific purpose grants or gifts when authorized by an official resolution or ordinance of the governing body stating the need for the recognition, and

WHEREAS, ORS 294.338(3) allows an increase in appropriations when a request for services, the cost of which is supplied by another entity, necessitates a greater expenditure of public money for any specific purpose in order to provide the services when authorized by an official resolution or ordinance of the governing body stating the need for the recognition, and

BE IT RESOLVED,

1. That the FY 2021-22 Budget and Schedule of Appropriations are hereby amended as shown in the column entitled “Revision” of Exhibits A and B to this Resolution for the purpose of modifying expenditures, approving new FTE, and transferring funds to and from contingency.
2. That the FY 2021-22 through FY 2025-26 Capital Improvement Plan is hereby amended accordingly.

ADOPTED by the Metro Council this 18th day of November, 2021.

Shirley Craddick

 Shirley Craddick, Deputy Council President

APPROVED AS TO FORM:

Carrie MacLaren

 Carrie MacLaren, Metro Attorney

Resolution 21-5203

Schedule of Appropriations

	Current Appropriations	Revisions	Adopted Budget
GENERAL FUND			
Council	8,817,678	288,600	9,106,278
Office of the Auditor	856,976	95,600	952,576
Office of Metro Attorney	3,139,062	190,900	3,329,962
Information Services	6,266,283	254,050	6,520,333
Communications	4,409,016	341,800	4,750,816
Finance and Regulatory Services	8,453,848	553,300	9,007,148
Human Resources	4,255,445	402,000	4,657,445
Capital Asset Management	3,333,313	84,400	3,417,713
Planning and Development Department	33,537,470	533,129	34,070,599
Parks and Nature	3,262,559	-	3,262,559
Special Appropriations	2,113,803	-	2,113,803
Non-Departmental			
Debt Service	14,388,655	-	14,388,655
Interfund Transfers	25,159,184	1,691,526	26,850,710
Contingency	18,986,628	(2,393,869)	16,592,759
<i>Total Appropriations</i>	136,979,920	2,041,436	139,021,356
Unappropriated Balance	27,665,482	-	27,665,482
Total Fund Requirements	164,645,402	2,041,436	166,686,838
AFFORDABLE HOUSING FUND			
Planning and Development Department	285,801,997	34,046	285,836,043
Non-Departmental			
Interfund Transfers	2,719,708	-	2,719,708
Contingency	35,000,000	(34,046)	34,965,954
<i>Total Appropriations</i>	323,521,705	-	323,521,705
Unappropriated Balance	249,978,295	-	249,978,295
Total Fund Requirements	573,500,000	-	573,500,000
GENERAL ASSET MANAGEMENT FUND			
Asset Management Program	20,077,247	441,526	20,518,773
Non-Departmental			
Interfund Transfers		1,000,000	1,000,000
Contingency	4,327,062	250,000	4,577,062
<i>Total Appropriations</i>	24,404,309	1,691,526	26,095,835
Unappropriated Balance	8,131,775	-	8,131,775
Total Fund Requirements	32,536,084	1,691,526	34,227,610
MERC FUND			
MERC	41,331,049	1,560,000	42,891,049
Non-Departmental			
Interfund Transfers	9,701,091	-	9,701,091
Contingency	7,044,212	-	7,044,212
<i>Total Appropriations</i>	58,076,352	1,560,000	59,636,352
Total Fund Requirements	58,076,352	1,560,000	59,636,352

Parks and Nature	4,209,566	(1,624,000)	2,585,566
Non-Departmental			
Interfund Transfers	910,627	-	910,627
Contingency	1,189,807	1,649,000	2,838,807
<i>Total Appropriations</i>	6,310,000	25,000	6,335,000
Total Fund Requirements	6,310,000	25,000	6,335,000
PARKS AND NATURE OPERATING FUND			
Parks and Nature	19,887,388	584,346	20,471,734
Non-Departmental			
Interfund Transfers	4,009,074	-	4,009,074
Contingency	8,018,671	(584,346)	7,434,325
<i>Total Appropriations</i>	31,915,133	-	31,915,133
Total Fund Requirements	31,915,133	-	31,915,133
RISK MANAGEMENT			
Finance and Regulatory Services	3,775,691	60,000	3,835,691
Non-Departmental			
Interfund Transfers	318,572	-	318,572
Contingency	235,000	(60,000)	175,000
<i>Total Appropriations</i>	4,329,263	-	4,329,263
Unappropriated Balance	200,844	-	200,844
Total Fund Requirements	4,530,107	-	4,530,107
SUPPORTIVE HOUSING SERVICES			
Planning and Development Department	173,864,603	392,843	174,257,446
Non-Departmental			
Interfund Transfers	13,873,816	95,235	13,969,051
Contingency	16,120,061	(488,078)	15,631,983
<i>Total Appropriations</i>	203,858,480	-	203,858,480
Total Fund Requirements	203,858,480	-	203,858,480
Total Appropriations	1,118,692,387	5,317,962	1,124,010,349
Total Unappropriated Balance	439,747,017	-	439,747,017
TOTAL BUDGET	1,558,439,404	5,317,962	1,563,757,366

Resolution 21-5203
Schedule of FTE

	Current FTE	Revisions	Adopted Budget
GENERAL FUND			
Total Fund FTE	288.40	18.00	306.40
MERC FUND			
Total Fund FTE	189.85	8.00	197.85
PARKS AND NATURE BOND FUND			
Total Fund FTE	36.55	0.50	37.05
PARKS AND NATURE OPERATING FUND			
Total Fund FTE	81.25	1.50	82.75
RISK MANAGEMENT			
Total Fund FTE	2.00	1.00	3.00
SOLID WASTE FUND			
Total Fund FTE	189.96	2.84	192.80
SUPPORTIVE HOUSING SERVICES			
Total Fund FTE	4.50	0.30	4.80
TOTAL FTE	988.66	32.15	1020.80

All other FTE remain as previously adopted

STAFF REPORT

IN CONSIDERATION OF RESOLUTION 21-5190 FOR THE PURPOSE OF AMENDING FY 2021-22 BUDGET AND APPROPRIATIONS SCHEDULE AND FY 2021-22 THROUGH FY 2025-26 CAPITAL IMPROVEMENT PLAN TO PROVIDE FOR CHANGES IN OPERATIONS

Date: October 25, 2021

Prepared by:
Jessica Eden, Budget Coordinator

Department: Finance and Regulatory Services

Presented by:
Marissa Madrigal, Chief Operating Officer
Cinnamon Williams, Financial Planning Director

Meeting date: November 18, 2021

Length: 30 minutes

ISSUE STATEMENT

This resolution will authorize changes in appropriations and FTE for FY 2021-22 and approve changes to the FY 2021-22 through FY 2025-26 Capital Improvement Plan.

ACTION REQUESTED

Council adoption of Resolution 21-5203.

IDENTIFIED POLICY OUTCOMES

Council approval will authorize changes in appropriations and FTE requested by departments for FY 2021-22 and approve requested changes to the FY 2021-22 through FY 2025-26 Capital Improvement Plan.

POLICY QUESTION

Council should consider whether the changes in appropriations and FTE have been justified, that adequate funds exist for identified needs and that proposed changes to the Capital Improvement Plan appear appropriate.

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Adoption of the Resolution will provide sufficient appropriations and FTE to accommodate the changes in operations outlined by departments. Adoption will also allow for changes to capital projects, again due to operational factors.

Disapproval of the Resolution will require departments to reevaluate their proposed changes to operational and capital plans due to the denied requests for additional resources and changes in capital projects.

STAFF RECOMMENDATIONS

The Chief Operating Officer recommends adoption of Resolution 21-5203.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

Relationship to Metro's Strategic Plan, racial equity, and climate action goals

By funding basic staff support and additional materials and services expenditures for operations, the Agency will more efficiently be able to focus on programming related to our guiding principles of racial justice, climate justice and resiliency and shared prosperity.

Known Opposition: None known.

Legal Antecedents: ORS 294.463(1) provides for transfers of appropriations within a fund, including transfers from contingency that do not exceed 15 percent of a fund's appropriation, if such transfers are authorized by official resolution or ordinance of the governing body. ORS 294.463(3) provides for transfers of appropriations or of appropriations and a like amount of budget resources between funds of the municipal corporation when authorized by an official resolution or ordinance of the governing body stating the need for the transfer. ORS 294.338(2) allows an increase in appropriations due to specific purpose grants or gifts when authorized by an official resolution or ordinance of the governing body stating the need for the recognition. ORS 294.338(3) allows an increase in appropriations when a request for services, the cost of which is supplied by another entity, necessitates a greater expenditure of public money for any specific purpose in order to provide the services when authorized by an official resolution or ordinance of the governing body stating the need for the recognition. ORS 294.463 (4) provides that public testimony be allowed if any funds are changing by more than 10 percent of a fund's expenditures. Metro code chapter 2.02.040 requires the Metro Council to approve the addition of any position to the budget. Metro's adopted financial policies require any project exceeding \$100,000 or an existing CIP project increasing greater than 20 percent to receive Council approval.

Anticipated Effects: This action provides for changes in operations and capital improvement plans as described below, and adds FTE.

Budget Impacts: This action has a \$5.3 million change in total appropriations, adds 32.14 FTE, and has the following impacts on the FY 2021-22 budget:

- **General Fund: \$2 million dollar change in appropriation, adds 18.0 FTE.**
 - \$2.74 million increase in departmental expenditures. Adds 18.0 FTE in central services and Planning and Development, and funds increases in personnel costs associated with non-represented employee PERS pickup change, AFSCME changes, as well as additional materials and services. Funding sources include:
 - \$254,675 in new revenues;
 - \$95,235 transfer from Supportive Housing Services;
 - \$2.4 million draw on General Fund contingency.
 - Recognizes \$691,526 in additional beginning fund balance and transfers the resource to the General Asset Management Fund/Glendoveer Subfund;
 - Recognizes a \$1 million transfer from the General Asset Management Fund and returns the resource back to the General Asset Management Fund to comply with budget law requirements for changes made between the approved and adopted budgets of more than 10% in a single fund's expenditures without additional public noticing.
- **General Asset Management Fund: \$1.7 million dollar net change in appropriation.**
 - Recognizes \$691,526 transfer from the General Fund and appropriates this resource to capital expenditures;

- Transfers \$1 million to the General Fund and recognizes a \$1 million return transfer from the General Fund;
- Realigns \$300,000 from capital to materials and services (\$50,000) and contingency (\$250,000).
- **Affordable Housing Fund: Net zero impact on total fund appropriations.**
 - Realigns \$34,046 from contingency to personnel to fund increases in personnel costs associated with AFSCME negotiation changes and non-represented employee PERS pickup changes.
- **MERC Fund: \$1.6 million net change to appropriation. Adds 8.0 FTE.**
 - Recognizes additional \$1.6 beginning fund balance from the CARES act received in FY 2020-21 and appropriates this to materials and services;
 - Realigns \$360,920 within personnel resources from reimbursable labor to regular labor to fund 8.0 FTE
- **Natural Areas Fund: \$25,000 net change to appropriation.**
 - Recognizes \$25,000 in new revenue;
 - Realigns \$1.6 million from materials and services (\$1 million) and capital outlay (\$624,000) to contingency.
- **Parks and Nature Bond Funds: Net zero impact on total fund appropriations. Adds 0.5 FTE**
 - Realigns \$390,986 from materials and services to capital outlay (\$357,820) and personnel services (\$33,166).
- **Parks and Nature Operating Fund: Net zero impact on total fund appropriations. Adds 1.5 FTE**
 - Realigns \$584,346 from contingency to capital outlay (\$35,000), materials and services (\$479,500), and personnel (\$69,846). Please see the Background section of this document for additional details.
- **Risk Management Fund: Net zero impact on total fund appropriations. Adds 1.0 FTE.**
 - Realigns \$60,000 from contingency to personnel services.
- **Solid Waste Fund: Net zero impact on total fund appropriations. Adds 2.84 FTE.**
 - Realigns \$1.1 million from capital outlay for land to materials and services (\$910,000) and personnel services (\$201,599).
- **Supportive Housing Services Fund: Net zero impact on total fund appropriations. Adds .3 FTE**
 - Realigns \$488,078 from contingency to materials and services (\$350,000), personnel services (\$42,843), and interfund transfers to the Research Center (General Fund) (\$95,235).

BACKGROUND

This section is organized by Department versus by fund. Each of the departments may have elements that are technical in nature, or substantive in nature, and changes to appropriation as necessary to fund Council's commitment to changes for the AFSCME negotiations and/or the non-represented employee PERS pickup. The following have been proposed for Council review and action:

CENTRAL SERVICES

Capital Asset Management:

Total requests require a transfer from General Fund contingency of \$84,400. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Capital Asset Management is making adjustments to the 5-year CIP, by correcting FY 2021-22 current year project budgets. No additional appropriation is being requested. Available budget that was not assigned to projects is being allocated to identified projects, per CIP detail (Attachment 1).

AFSCME & PERS

The costs associated with the AFSCME negotiation (\$63,700) and the non-represented employee PERS pickup (\$20,700) requires a transfer from General Fund contingency for \$84,400 to increase appropriations.

Communications:

Total requests require a transfer from General Fund contingency of \$341,800. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Communications requests staffing and operating budget adjustments to better serve the agency needs. The proposed budget adjustments will help ensure the Communications Department can most fully support Metro's overall commitment to keep our promises and build back better. These changes total 2.2 FTE. Communications is absorbing the cost of 1.0 FTE in the current year associated with Supportive Housing Services. The request requires a transfer from General Fund contingency of \$227,900.

The following positions (including with computers, software and training), strengthen equity within the organization and best position ourselves to deliver the necessary agency-wide support.

- Increase Assistant Communications Specialist from .5 FTE to .7 FTE (add .2 FTE). Partial year costs of \$15,800
- Add 1.0 FTE Associate Public Affairs Specialist) to serve as team coordinator for WPES. Partial year costs of \$106,000
- Additional staffing changes to ensure proper classifications of staff, obtain variable hour support for department administrative functions \$22,400
- With centralization of communications staff, additional operational support is necessary for materials and services for a total requested increase is \$83,700 in on-going support
- 1.0 FTE Senior Public Affairs Specialist to develop a communications and public relations plan for Supportive Housing Services: Partial year costs of \$63,800 **No appropriation requested**

AFSCME & PERS

The costs associated with the AFSCME negotiation (\$86,800) and the non-represented employee PERS pickup (\$27,100) requires a transfer from General Fund contingency for \$113,900 to increase appropriations.

Council:

Total requests require a transfer from General Fund contingency of \$288,600. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Prior to budget reductions in response to the financial crisis caused by COVID-19, each Councilor had their own Policy Advisor. Council office eliminated one Policy Advisor position and duties were distributed among the remaining staff. Adding back a 1.0 FTE Policy Advisor II will allow each Councilor to once again have a designated Policy Advisor to assist with policy and strategy development. Partial year costs of \$62,000 (annualized cost of \$124,000).

This request requires a transfer from General Fund contingency for \$62,000 to increase appropriations.

AFSCME & PERS

The costs associated with the AFSCME negotiation (\$12,300) and the non-represented employee PERS pickup (\$214,300) requires a transfer from General Fund contingency for \$226,600 to increase appropriations.

Finance and Regulatory Services:

Total requests require a transfer from General Fund contingency of \$551,300 as well as \$60,000 from the Risk Fund. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Finance and Regulatory Services requests the following to restore capacity lost from fiscal year 2020-21 budget cuts and to build back better:

- Procurement:
 - \$30,000 to restore partial-year materials and services budget supporting Equity in Contracting program (sponsorships, trainings, outreach events)
 - \$6,000 for new software restoring functionality lost due to the new State of Oregon procurement system project.
 - Add back 1.0 Procurement Analyst II (was cut during budget reductions). Partial year costs of \$102,000
- Accounting:
 - Increase existing .7 FTE to .8 FTE to accommodate workload in the accounting function stemming from new accounting standards and programs at Metro. Total partial year costs of increase is \$10,300
- Payroll:
 - Add 1.0 FTE Timekeepers (Program Assistant II classification) to support agency-wide managers in recording and reporting staff time, improving payroll data accuracy and timeliness. Partial year costs of \$55,800
- Financial Planning:
 - 1.0 Assistant Management Analyst to support Venue financial activity and reporting. Partial year costs of \$63,000
- Risk:
 - 1.0 Risk Technician (Program Technician classification) to handle administrative duties for Risk Management and Safety Program. Partial year costs of \$60,000
- \$10,000 for computer equipment for new FTE

These requests require a transfer from General Fund contingency for \$332,900 to increase appropriation in the General Fund and \$60,000 transfer from Risk Fund contingency to increase appropriation in the Risk Fund.

AFSCME & PERS

The costs associated with the AFSCME negotiation (\$155,300) and the non-represented employee PERS pickup (\$120,900) requires a transfer from General Fund contingency for \$276,200 to increase appropriations.

Human Resources:

Total requests require a transfer from General Fund contingency of \$402,000. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Human Resources department is engaged in the work to: advance diversity-focused recruitment and selection strategies, reimagine classification structures to incorporate an equity lens, develop a revamped system and model for performance planning, and create brand new programs for mentorship and succession planning. This work requires a strong, capable, and stable HR department.

HR requests 2.0 FTE (one to support employee relations and the other to support recruitment), variable hour staffing support, and operational support (computer equipment needs for new FTE):

- 1.0 FTE as a HR Department Coordinator (Program Technician). Partial year costs of \$90,000
- 1.0 FTE HR Business Partner (Program Analyst). Partial year costs \$118,600
- \$15,000 in Variable Hour staffing support for recruitment
- \$4,000 for computer equipment for new FTE

These requests require a transfer from General Fund contingency for \$227,600 to increase appropriations.

AFSCME & PERS

The costs associated the non-represented employee PERS pickup (\$174,400) requires a transfer from General Fund contingency for \$174,400 to increase appropriations.

Information Services:

Total requests require a transfer from General Fund contingency of \$254,050. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Information Services requests adjustments to the 5-year CIP, by correcting FY 2021-22 current year project budgets. No additional appropriation is being requested. (Attachment 2).

Information Services requests the following:

- Add back 1.0 FTE Administrative Assistant III. Information Services reduced its assistant during the budget cuts in 2020. This position is key in helping the IS department deliver core functionality, such as purchasing, administration of software contracts and cell phones, coordinating disbursement of hardware and software orders and aiding in projects and other administrative functions in the department. Partial year costs of approximately \$77,500
- Add back 1.0 FTE Systems Analyst III. Information Services lost its project management team during the downsizing in 2020 in response to the pandemic. Project management is vital to implementing software and new technologies to meet the needs of various departments throughout the agency. Partial year costs of \$100,000
- Additionally, Information Services requests \$4,000 for computer technology and equipment for the new FTE

These requests require a transfer from General Fund contingency for \$181,450 to increase appropriations.

AFSCME & PERS

The costs associated with the AFSCME negotiation (\$53,800) and the non-represented employee PERS pickup (\$18,800) requires a transfer from General Fund contingency for \$72,600 to increase appropriations.

Office of the Metro Attorney:

Total requests require a transfer from General Fund contingency of \$190,900. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

The Office of Metro Attorney is requesting an additional 1.0 FTE for an attorney (Legal Counsel I or II). This position will primarily advise WPES, including complex contract review and negotiation, regulatory issues, and program matters. This attorney will also provide advice and counsel on a variety of legal issues related to public contracting and general government law.

While this position will primarily advise WPES, the need for the position is driven by growth in multiple program areas, including the Affordable Housing Bond Program (2018); new and expanded programs in the Parks and Nature Bond (2019); Supportive Housing Services (2020); and new and expanded programs and services in WPES; as well as continued increase in activity for DEI. These program areas relate to Metro's commitments to both keep our promises and build back better.

OMA is requesting partial year costs of \$108,000 plus \$7,000 for on-going licensure, professional development, and computer technology equipment.

These requests require a transfer from General Fund contingency for \$115,000 to increase appropriation.

AFSCME & PERS

The costs associated with the non-represented employee PERS pickup (\$75,900) requires a transfer from General Fund contingency for \$75,900 to increase appropriations.

Office of the Metro Auditor:

Total requests require a transfer from General Fund contingency of \$95,600. This funds departmental requests as well as costs associated with the AFSCME negotiation and/or the non-represented employee PERS pickup.

Departmental Request(s)

Please see Attachment 6

AFSCME & PERS

The costs associated with the non-represented employee PERS pickup (\$25,600) requires a transfer from General Fund contingency for \$25,600 to increase appropriations.

PARKS AND NATURE

Parks and Nature requests include recognizing \$25,000 in new revenue, realignment in the existing budget to true up spending related to capital projects and fund partial year costs for 2.0 FTE. There are additional changes to the Parks and Nature CIP due to a change in methodology. Changes are outlined by fund below. Please see Attachment 4 for additional CIP details.

Parks Operating Fund

There are four capital restoration projects that are being amended to more appropriately reflect the project timelines and budget needs. LR036, LR038 and LR230 are adding unspent FY 2020-21 money into FY 2021-22 and FY 2022-23 while LR903 is being delayed 1 year based on internal staff capacity. Funding is being pulled from the Science/Conservation operating budget.

The Parks and Nature department worked with Capital Asset Management and Finance and Regulatory Services to determine a better way to track non-capital habitat restoration projects outside of the CIP process (as they are not capital in nature). As such, the projects currently budgeted on the CIP that are non-capital habitat restoration are being removed from the CIP during this amendment cycle and being added back to the Science/Conservation operating budget.

There are three capital restoration projects that are not currently on the CIP that are planned to begin in FY 2021-22. They are being added during this amendment cycle. They are LR414, LR066, and LR067. They meet the criteria for capital restoration discussed above. Funding is being pulled from the Science/Conservation operating budget.

The North Tualatin Mountains project is in the land use/planning phase. Dollars committed in FY 2020-21 for the design work were left unspent. This amendment adds those back into the FY 2021-22 budget.

Blue Lake Park is under-going a substantial renovation. As a result, temporary office trailers are being brought on-site to house staff during demo/construction. The trailers were supposed to be delivered during FY 2020-21 but did not end up getting delivered until August 2021. As a result, the cost of trailer installation is being added to the FY 2021-22 budget (\$175,000). Additionally, the monthly rental cost is slightly higher than originally anticipated, so additional money is being added to pay for that (\$15,000) for a total increase to FY 2021-22 of \$190,000.

As a part of the department's implementation of the Parks and Nature Racial Equity, Diversity and Inclusion (REDI) Action Plan, there is a request for additional funds to implement one of five strategic racial equity initiatives, Wellness Series for Staff of Color. The series will be conducted by a 3rd party consultant and result in tangible tools that will be used by Staff of Color in perpetuity.

The P&N Community Investments & Partnerships team did not complete the fairly expensive training they intended to during FY 2020-21. Those un-spent dollars are being added back to the FY 2021-22 budget.

The road into the Howell farming area that's currently being leased by Black Food Sovereignty Coalition is not paved nor graveled. The road in and parking lot near the farming area needs to be graveled and fenced in order to properly provide access to the site for Metro's tenant. The estimated cost is \$90,000.

Park Operations requires \$100,000 for trunked radios. After multiple emergencies at Park sites over the past two years, it's clear that staff need a more reliable communication method. This solution allows for communications between staff across Metro properties and across all work teams. It also provides direct contact with Oregon State Police Dispatch in the event of major emergencies.

Additionally, Parks and Nature requests 1.5 FTE in the Parks Operating Fund.

- 0.5 FTE #1 – Program Assistant I. In order to successfully deliver on our commitments to voters and to meet the expectations of the Metro Council, the community investments and partnerships team needs increased administrative support. The department is requesting a 1.0 FTE position that is split between the operating and bond funds. The critical tasks for this position are being met by a variety of admin staff in an interim capacity but that is no longer possible within the current team structure and significantly increased workload due to the activation of the 2019 bond-funded local share, participatory grantmaking pilot and capital grants programs. There is also a need for increased support for community stewardship and restoration grants, and the community partnerships program. Partial year cost \$33,160
- 1.0 FTE #2 – Service Supervisor II. The Parks and Nature administrative manager currently supervises 4 guest services coordinators and 1 park operations assistant as part of their responsibilities and it has proven challenging to fully embed in park operations while also managing several other high-priority projects for Parks and Nature. Having a dedicated supervisor who regularly reports on-site at park offices and is an experienced customer service professional will provide the resources and support that the parks division currently needs as well as set up a reporting structure that will support the continued growth of our parks portfolio with the possibility of new park offices and park operations administrative staff. Partial year cost \$36,686

Natural Areas Fund

The Marine Drive Trail project budget is being amended to reflect the updated project schedule. Most of the construction will take place in FY 2022-23. As such, \$650,000 from the FY 2021-22 capital budget is being moved into FY 2022-23.

The department is working with ODOT and City of Portland regarding a decision on whether or not to build the Columbia Blvd Bridge. Regardless of the outcome of the decision making process, the bridge will not be built in FY 2021-22. As such, the project budget is being pushed out 1 year.

Stabilization at Cazadero North experienced delays in FY 2020-21 related to the Riverside Fire. The unspent FY 2020-21 money is being added back to the FY 2021-22 budget as well as the remaining due from the grantor for the related grant.

Parks and Nature Bond Fund(s)

The department requests .5 FTE in addition to multiple Capital Improvement Plan changes within the Parks and Nature Bond Fund(s).

- 0.5 FTE #1 – Program Assistant I. In order to successfully deliver on our commitments to voters and to meet the expectations of the Metro Council, the community investments and partnerships team needs increased administrative support. The department is requesting a 1.0 FTE position that is split between the operating and bond funds. The critical tasks for this position are being met by a variety of admin staff in an interim capacity but that is no longer possible within the current team structure and significantly increased workload due to the activation of the 2019 bond-funded local share, participatory grantmaking pilot and capital grants programs. There is also a need for increased support for community stewardship and restoration grants, and the community partnerships program. Partial year cost \$33,160

In scoping the Blue Lake Park demolition project, it was determined that the fishing pier was no longer structurally sound. As a result, demo of the fishing pier is being added to the project budget. This was not included in the original scope, so the increase is substantial (total \$1 million, but just \$295,000 this year).

The Blue Lake water system requires nearly a full rebuild. The project has been broken into 3 individual projects. The FY 2021-22 budget is being amended to include the 2 new arms of the project (water ph2 and sanitary) as well as to update each project's annual budget appropriation.

Blue Lake Park was a site identified in the 2019 Parks and Nature Bond Measure that is set to receive significant bond funding for renovation. A steering committee for the project has been formed and the planning work for the renovation project is beginning in FY 2021-22. As such, the project budget is being added to the CIP with planning dollars set aside for FY 2021-22.

Oxbow Regional Park needs major repair work on it's roadway and water system. Before those projects can begin, scoping work is required that is going to be contracted out. This budget amendment decreases the roadway and water system projects as they're being placed on pause until the scoping work can take place. Additionally, money is being added to conduct the scoping effort.

The Oxbow Welcome Center Phase 2 project includes adding a generator to the building. This is being broken out as a separate project and tracked as an individual asset.

The work from the Oxbow Civil Survey project was absorbed into another capital project and will no longer being tracked separately. The allocation is being removed during this amendment cycle. There are four capital projects that are being amended to more appropriately reflect the project timeline and budget needs.

Some of the build-out of Parks and Nature's TerraTrak software was budgeted to be completed in FY 2020-21 but did not get done before 06/30/21. Those un-spent dollars are being added back to the FY 2021-22 budget.

Parks and Nature Renewal and Replacement Fund

There were 3 Oxbow R&R projects that were not completed during FY 2020-21 that were also not carried forward. These are the Oxbow Wayfinding/Signage project, the Oxbow Bridge Repair project, and the Oxbow Boat Ramp ADA Parking project. Appropriation is being added to complete

these 3 projects. The funding is being pulled from the general R&R placeholder budget that was budgeted in lump sum for amendments such as these.

Glendoveer Golf Course and Regional Parks Capital Fund

The St John's Prairie Trail design work is currently budgeted entirely in FY 2021-22. The project schedule indicates that part of the work will happen in FY 2021-22 and the rest will happen in FY 2022-23. The budget is being updated in this amendment to reflect the estimated FY 2021-22 expenditures.

The Glendoveer Golf Course has a well that's failing. A project is being added to the CIP to replace the failing well at the golf course.

Annually, if there is any positive ending fund balance in the Glendoveer Golf Course Fund (a subfund of the General Fund) the amount should be transferred and retained in a capital fund for deferred maintenance and infrastructure projects at the site. This amendment recognizes the FY 2021-22 beginning fund balance resulting from the FY 2020-21 ending fund balance in fund 162 and then transfers that money to the Regional Parks Capital Fund (a subfund of the General Asset Management Fund).

PLANNING AND DEVELOPMENT

Planning and Development is recognizing \$254,675 in new revenue, and requests 6.0 FTE to support increased project needs in Supportive Housing Services, Transportation and department coordination. Additionally, Planning and Development requests an intrafund transfer from the General Fund, and realignment from contingency in Affordable Housing and Supportive Housing Services Funds to offset costs associated with AFSCME negotiation changes and non-represented employee PERS pickup.

Departmental Request(s)

The Planning & Development & Research department is experiencing a significant increase in projects in transportation and housing, and still feeling the impacts of staff reductions caused by the COVID-19 pandemic. These FTE increases will allow the department to meet the project needs this fiscal year, and are funded as noted below. The Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) funds must be recommended by JPACT to Council and adopted by Council before the FTE funded by CRRSAA will be filled.

- 1.0 FTE #1: Principal Transportation Planner to support the Interstate Bridge Replacement (IBR) program, funded by an IBR agreement with Washington Department of Transportation. Partial year costs of \$72,500
- 1.0 FTE #2: Assistant Transportation Planner to support multiple projects in Investment Areas (IBR, TV Highway, Westside Multimodal Corridor Study and Columbia Connects), funded by CRRSAA. Partial year costs of \$56,300
- 1.0 FTE #3: Senior Transportation Planner to support the 2023 Regional Transportation Plan update, funded by CRRSAA. Partial year costs of \$69,500
- 1.0 FTE #4: Assistant GIS Specialist to develop maps and visuals to communicate transportation plans, policies and programs, funded by CRRSAA. Partial year costs of \$56,300
- 1.0 FTE #5: Assistant GIS Specialist to develop a Supportive Housing Services (SHS) database structure and reporting tools, funded by a transfer from SHS to cover the fully loaded cost. Partial year costs of \$56,300

- 1.0 FTE #6: Program Coordinator II to provide support and coordination to Planning Directors on transportation, housing and economic development, funded partially by SHS and partially through the indirect rate. Partial year costs of \$63,900

The Supportive Housing Services program also requests an increase of \$350,000 in materials and services for development of a regional data framework and to support programmatic investments as directed by the Tri-County Advisory Board.

AFSCME & PERS

Additionally, the costs associated with the AFSCME negotiation changes and non-represented employee PERS pickup (\$229,337) requires an intrafund transfer from General Fund contingency (\$171,605), a draw on Affordable Housing Fund contingency (\$34,046), and a draw on Supportive Housing Services contingency (\$23,686) to increase appropriations.

VISITOR VENUES

Portland'5 is the only visitor venue requesting changes to their budget at this time. The changes recognizes additional beginning fund balance, increasing appropriation by \$1.6 million, and add 8.0 FTE.

Portland'5

Portland'5 Capital Changes:

Spending on several existing P'5 capital projects will continue into FY 2021-22, requiring additional appropriation from P'5 capital reserves relative to what was originally budgeted in FY 2021-22. These projects include the Keller Cafe, Broadway and Park Marquees, and the Schnitzer Acoustical Enhancements. Overall project costs are not increasing substantially, but the spending has crossed fiscal years. In addition, work is moving forward on a sewer line replacement at the Arlene Schnitzer Concert Hall. All or a portion of the sewer line work may eventually be funded by the City of Portland, but contracting and initial spending needs to take place in the near term. Metro staff are in active conversations with the City of Portland to identify funding via amendment to the City's current year budget.

This amendment increases budgeted capital fund balance in Portland'5 by \$1.56 million, to \$1.86 million, with approximately \$300,000 remaining in unappropriated capital reserves.

Please see Attachment 3 for details.

Portland'5 FTE Changes

As P'5 is beginning its re-opening process, the approach to budgeting event custodians was reexamined. These are lower-wage employees that were previously budgeted as variable hour employees (guaranteed a 32 hour work week under the CBA with IUOE-701-1). As part of reopening, a determination was made that these employees should be provided the stability and assurances of full time positioned employment with Metro. Upon rehiring, P'5 plans to establish them in full time budgeted positions.

This amendment will establish 8.0 FTE event custodians, replacing staff time previously accounted for as variable hour staffing. No additional appropriation is needed, as event custodian hours are currently budgeted as variable hour staffing. The cost for 8.0 FTE event custodians is about 14% higher than the budget in FY 2019-20 for equivalent variable hour staffing (full year).

WASTE PREVENTION AND ENVIRONMENTAL SERVICES

Waste Prevention and Environmental Services requests realignment in the existing budget to true up spending related to capital projects and fund partial year costs for 2.84 FTE.

Waste Prevention and Environmental Services made several budget reductions in response to the COVID-19 global pandemic. As the situation improves, the WPES seeks to add frontline and support positions (2.84 FTE) to respond to increased customer counts at the stations and ongoing program needs across the department. Additionally, this amendment will designate additional funding for unexpected concrete repair and maintenance each transfer station as well as a project that experienced delays in FY 2021-22. No additional appropriation is needed for this amendment request. The land purchase included on the FY 2021-22 CIP did not proceed, so the department will use part of that funding to cover the changes in this amendment. In FY 2021-22, reductions to capital projects covers expense associated with increased FTE. Please see Attachment 5 for CIP change details.

The requests are summarized as follows:

- The Deputy Director position was reduced by .1 FTE in December 2020 as part of the budget reduction package in response to the COVID-19 pandemic. This request will restore the position to 1.0. Partial year cost \$12,708 (annualized cost of \$21,785).
- Increase a Senior Solid Waste Planner position by .5 FTE within Policy and Programs to meet current and ongoing business needs. Partial year cost \$48,201 (annualized cost of \$82,631).
- Increase 4 partial Scalehouse Technician positions so that each position is 1.0 FTE. These positions will support the increased customer traffic, vacation planning and sick leave coverage across the program. This results in a total increase of 1.25 FTE across the 4 positions. Partial year cost \$55,800 (annualized cost of \$95,656).
- Add 1.0 FTE for a Traffic Control Operations Supervisor. The additional position will co-supervise the team, help with supervisor coverage (vacation/sick time), resolve any span of control issues, and provide an increased level of supervisor support. Partial year cost \$84,890 (annualized cost of \$145,526).
- Add \$600k to Metro South for concrete repair and maintenance. This is to cover expenses for unexpected repairs above the annual concrete repair and maintenance budget.
- Add \$310k to the Metro South restroom/ shower renovation project. This adds funding to complete this project which was a carryover from the prior fiscal year. The project experienced delays but is currently on track to be completed in FY21-22.
- The land acquisition budget of \$8.4M will be reduced by \$1.4M to cover the changes in this amendment. The land purchase has been delayed as the department searches for a property to purchase.

ATTACHMENTS

- Resolution 21-5203
- Exhibit A – Schedule of Appropriations
- Exhibit B – Schedule of FTE
- Attachments 1-5 - Capital Improvement Plan changes
- Attachment 6 – Memo from the Metro Auditor

**Mid Year Amendment FY 2021-22 Budget
Capital Improvement Plan (CIP) Detail Changes
Capital Asset Management**

Financial Planning Use

Attachment 1
Resolution 21-5203

New? Y/N	Project ID	Project Title	GL Acct	Fund ID	Dept ID	FY 2021-22			CIP Amended	CIP Amended	CIP Amended	FY 2024-25 CIP Amended	FY 2025-26 CIP Amended	Notes (i.e delay/cancel other projects, contingency)
						CIP	Change Request*	CIP Amended						
N	MRC017	MRC Office Suites Remodel	579000	618	434	700,000	(100,000)	600,000	-	-	-	-		
N	MRC020	MRC Wayfinding & Interpretive	579000	618	434	100,000	100,000	200,000	-	-	-	-		
N	MRC015	MRC Interior & Exterior Coatings	579000	618	434	550,000	15,944	565,944	-	-	-	-		
N	MRC014	MRC Lighting Upgrades	579000	618	434	600,000	549,422	1,149,422	-	-	-	-		
N	MRC016	MRC Metro Together Workplace	579000	618	434	460,000	(158,183)	301,817	-	-	-	-		
N	MRC003	MRC Daycare Improvements	579000	618	434	-	41,090	41,090	-	-	-	-		
N	MRC013	MRC Underground Garage Entrance	579000	618	434	-	108,240	108,240	-	-	-	-		
								-	-	-	-	-		
								-	-	-	-	-		
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								-	-	-	-	-		

* Change Request Column for current FY should agree to changes to projects on Operating changes on Tab

Mid Year Amendment FY 2021-22 Budget
 Capital Improvement Plan (CIP) Detail Changes
 Parks and Nature

Financial Planning Use

Attachment 4
 Resolution 21-5203

New? Y/N	Project ID	Project Title	GL Acct	Fund ID	Dept ID	FY 2021-22			FY 2022-23			FY 2023-24			FY 2024-25			FY 2025-26		Notes (i.e delay/cancel other projects, contingency)	
						CIP	Change Request*	CIP Amended	CIP	Change Request	CIP Amended	CIP	Change Request	CIP Amended	CIP	Change Request	CIP Amended	CIP	Change Request		CIP Amended
N	LR036	Barton Natural Area Stream & Turtle Restoration	525000	165	03210	65,000	70,000	135,000	20,000	280,000	300,000	-	15,000	15,000	-	-	-	-	-	Add unspent FY21 money	
N	LR038	North Newell Stream Restoration	525000	165	03210	25,000	118,300	143,300	-	195,490	195,490	-	5,000	5,000	-	-	-	-	-	Add unspent FY21 money	
N	LR230	Beaver Creek Stream Restoration	525000	165	03210	20,000	30,000	50,000	-	145,000	145,000	-	90,000	90,000	-	-	-	-	-	Add unspent FY21 money	
N	LR903	Ennis Creek Road Repair	571000	165	03220	55,000	(55,000)	-	345,000	(300,000)	45,000	-	400,000	400,000	-	-	-	-	-	Project delayed 1 year	
N	LR409	Smith & Bybee Wetlands - St. Johns Prairie	525000	165	03210	50,000	(50,000)	-	350,000	(350,000)	-	35,000	(35,000)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR671	Killin Wetland Hydrologic Assessment	525000	165	03210	50,000	(50,000)	-	200,000	(200,000)	-	40,000	(40,000)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR672	Killin Wetland Floodplain Enhancement	525000	165	03210	50,000	(50,000)	-	200,000	(200,000)	-	38,000	(38,000)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR412	Smith & Bybee Forested Wetlands Phase 3	525000	165	03210	50,000	(50,000)	-	180,000	(180,000)	-	30,000	(30,000)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR147	Fern Hill Forest Stream & Savana Restoration	525000	165	03210	50,000	(50,000)	-	150,000	(150,000)	-	9,000	(9,000)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR081	Cooper Mtn Oak Woodland Praire	525000	165	03210	50,000	(50,000)	-	100,000	(100,000)	-	200,000	(200,000)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR820	Heritage Pine	525000	165	03210	50,000	(50,000)	-	100,000	(100,000)	-	22,850	(22,850)	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR808	Weber Farms Natural Area Forest Restoration	525000	165	03210	50,000	(50,000)	-	50,000	(50,000)	-	200,000	(200,000)	-	17,000	(17,000)	-	-	-	Remove from CIP - not capital	
N	LR664	N. Multnomah Channel Marsh Ecotone Enhancement	525000	165	03210	26,000	(26,000)	-	-	-	-	-	-	-	-	-	-	-	-	Remove from CIP - not capital	
N	LR146	Gales Forest Grove Stream Restoration in partnership w	525000	165	03210	12,000	(12,000)	-	-	-	-	-	-	-	-	-	-	-	-	Remove from CIP - not capital	
Y	LR14	S&B Bank Integrity	525000	165	03210	-	150,000	150,000	-	50,000	50,000	-	-	-	-	-	-	-	-	Add to CIP, construction element exists	
Y	LR066	Jonsson Center Stream & Wetland Restoration	525000	165	03210	-	40,000	40,000	-	40,000	40,000	-	150,000	150,000	-	5,000	5,000	-	-	Add to CIP, construction element exists	
Y	LR067	Lower Clear Green Restoration Ph2	525000	165	03210	-	10,000	10,000	-	10,000	10,000	-	75,000	75,000	-	250,000	250,000	-	5,000	5,000	Add to CIP, construction element exists
N	BA020	Marine Drive Trail	571000	351	03430	1,000,000	(650,000)	350,000	1,000,000	1,650,000	2,650,000	650,000	-	-	-	-	-	-	-	delayed and increase \$	
N	BA010	Columbia Blvd Bridge	531800	351	03430	1,000,000	(1,000,000)	-	-	1,000,000	1,000,000	-	-	-	-	-	-	-	-	delayed	
N	G46015	Cazadero North Stream & Wetland Restoration	570000	351	02740	5,000	26,000	31,000	-	-	-	-	-	-	-	-	-	-	-	increase \$ for grant funding	
N	PBL012	Blue Lake Park Building Demolition Plan	571000	352	03450	596,700	294,300	891,000	-	899,534	899,534	-	-	-	-	-	-	-	-	increase for demo of fishing pier	
N	PBL010	Blue Lake Water System Ph1	571000	352	03450	200,000	700,000	900,000	1,000,000	1,000,000	(1,000,000)	-	-	-	-	-	-	-	-	update annual allocations	
Y	PBL014	Blue Lake Water System Ph2	579000	352	03450	-	350,000	350,000	-	1,600,000	1,600,000	-	92,000	92,000	-	-	-	-	-	new project	
Y	PBL015	Blue Lake Sanitary System	579000	352	03450	-	450,000	450,000	-	1,850,000	1,850,000	-	1,000,000	1,000,000	-	-	-	-	-	new project	
Y	PBL011	Blue Lake Park Renovation	579000	352	03450	-	50,000	50,000	-	200,000	200,000	-	750,000	750,000	-	2,000,000	2,000,000	-	5,000,000	5,000,000	new project
N	POX012	Oxbow Potable Water System	571000	352	03450	500,000	(500,000)	-	2,000,000	2,000,000	3,500,000	3,500,000	850,000	850,000	-	-	-	-	-	project delayed, need scoping proj 1st	
N	POX014	Oxbow Roadway Improvements	571000	352	03450	900,000	(900,000)	-	1,000,000	1,000,000	2,450,000	2,450,000	1,000,000	1,000,000	-	-	-	-	-	project delayed, need scoping proj 1st	
Y	POX020	Oxbow Water & Road Analysis	579000	352	03450	-	75,000	75,000	-	75,000	75,000	-	-	-	-	-	-	-	-	new project	
N	POX013	Oxbow Welcome Center Ph. 2	571000	352	03450	350,000	(110,000)	240,000	-	-	-	-	-	-	-	-	-	-	-	add money to POX017	
Y	POX017	Oxbow Generator	579000	352	03450	-	110,000	110,000	-	-	-	-	-	-	-	-	-	-	-	add money from POX013	
N	POX009	Oxbow Civil Survey	524000	352	03450	25,000	(25,000)	-	-	-	-	-	-	-	-	-	-	-	-	project cancelled	
N	PBL009	Blue Lake Curry Bldg Replcmnt	572000	352	03450	600,000	(358,000)	442,000	1,000,000	2,000,000	3,000,000	5,000,000	(1,100,000)	3,900,000	500,000	(342,451)	157,549	-	-	update annual allocations	
N	CEM010	Lone Fir - Cultural Heritage Garden	571000	352	03450	100,000	(50,000)	50,000	250,000	(100,000)	150,000	250,000	-	250,000	3,000,000	3,000,000	650,000	(100,000)	550,000	update annual allocations	
N	PG00BD	Graham Oaks ADA T-Plan Improvements	571000	352	03430	100,000	(100,000)	-	80,000	(80,000)	-	-	-	-	-	-	-	-	-	update project code	
Y	PG0001	Graham Oaks ADA T-Plan Improvements	579000	352	03450	-	80,000	80,000	-	100,000	100,000	-	-	-	-	-	-	-	-	update project code and annual alloc	
N	LT900	CRNP 1% for Art	578800	352	03430	57,000	(57,000)	-	-	-	-	-	-	-	-	-	-	-	-	update project code	
Y	PCR001	CRNP 1% for Art	579000	352	03430	-	60,000	60,000	-	-	-	-	-	-	-	-	-	-	-	update project code and annual alloc	
N	PTR001	St Johns Prairie Trail Design	571000	360	03430	750,000	(250,000)	500,000	-	320,000	320,000	-	-	-	-	-	-	-	-	delay and add unspent FY21 into FY23	
Y	GF117	Glendoveer Well Replacement	579000	360	03371	-	300,000	300,000	-	-	-	-	-	-	-	-	-	-	-	new project	

* Change Request Column for current FY should agree to changes to projects on Operating changes on Tab



Brian Evans
Metro Auditor
600 NE Grand Ave
Portland, OR 97232-2736
TEL 503 797 1892, FAX 503 797 1831

November 1, 2021

To: Marissa Madrigal, COO

From: Brian Evans, Metro Auditor *BE*

Re: FY 2021-21 Budget Amendment Request

I am requesting an additional 1.0 FTE for an auditor (Senior or Principal Management Auditor). This position will conduct performance audits to increase the office's capacity to conduct multiple audits at the same time. I seek funding for a hire date of January 1, 2022.

The need for the position is driven by growth in Metro's program and services including the Affordable Housing Bond Program (2018) and Supportive Housing Services (2020); as well as continued activity for DEI and changes to internal controls resulting from the remote work environment. Performance audits provide independent and objective information to ensure effective and efficient operations, and accountability for the promises made to voters.

More specifically, the Supportive Housing Services ballot measure promised annual performance audits which will require increased staffing once the program is fully operational in spring 2022. The Auditor's Office has already conducted early implementation audits of the Affordable Housing Bond and Supportive Housing Services ballot measure. Those audits provided insight about the need to increase capacity to ensure effective and efficient audit coverage of those programs. Continuing to apply a DEI lens to our work and responding to changes to internal controls as the agency shifts to a more flexible remote work environment are two other factors driving the need for additional capacity. Over the last two years, the Auditor's Office has dedicated significant resources to both of those areas, but those efforts cannot be sustained without increased staffing.

While both the size and scope of Metro programs and services have expanded, the Office of the Metro Auditor has not added any staff to the office since 2008. Benchmark data from the Association of Local Government Auditors and a recent survey of audit offices in Oregon and Washington, shows funding for Metro's audit function has not kept pace. The Metro Auditor's budget compared to the overall agency budget is about half of the national average for audit offices of similar size, and about 20 percent lower than the average of audit offices in Oregon and Clark County, Washington. The data also shows the average cost per auditor at Metro is lower than the national and Oregon averages, which indicates higher cost-effectiveness compared to peer organizations.

cc: Brian Kennedy, CFO
Robin Briggs, Central Services Finance Manager, Finance & Regulatory Services
Jessica Eden, Budget Coordinator, Finance & Regulatory Services
