



METRO

2000 S.W. First Avenue
Portland, OR 97201-5398
503/221-1646

Memorandum

DATE: January 7, 1993
TO: Judy Wyers, Presiding Officer
FROM: Mike Gates, Metro Councilor, District 5
RE: Apportionment Committee Appointments

Since Clackamas County is required by the new Metro charter to have two appointments to the Apportionment Committee, I would like to submit the name of John H. (Jack) Hammond.

Jack is an attorney from West Linn, Oregon. He has served as City Attorney for several municipalities, particularly in Clackamas County. He also has served as a citizen leader in the area and has been a wonderful resource in developing master plans in the cities.

If you wish to call Jack, his phone number is 656-1649. My best success in catching him has been in the afternoons. If you prefer his mailing address, please let me know.

Thank you for considering Jack for appointment.



METRO

2000 SW First Ave.
Portland, OR 97201-5398
(503) 221-1646

Memorandum

DATE: March 4, 1993
TO: Mayor Rob Drake
FROM: Councilor Mike Gates
RE: Forum on Cooperative Urban Services

Over the last two months I have had a chance to meet one-on-one with many elected officials in the region. I've also attended several gatherings and meetings of City Councils and County Commissions. From these conversations I have developed concerns about the direction of the Forum on Cooperative Urban Services (FOCUS). This letter is an effort to solicit your views on FOCUS.

FOCUS held its first meeting two years ago, in February of 1991, and has met periodically since then. Bylaws have been proposed and adopted, and public funds spent to support FOCUS activities. Many FOCUS members became involved in the Regional Governance Committee last year, and FOCUS met infrequently in 1992. Following the adoption of the Metro Charter in November, the Regional Governance Committee - an outgrowth of FOCUS - has disbanded and its members have renewed their interest in FOCUS activities.

The organization's bylaws set forth its purposes. Those include the creation of "a neutral forum to facilitate cooperation, mutual collaboration, and common coordinated action on a wide variety of issues impacting the general purpose governments in the Portland metropolitan area." The bylaws further establish three "levels of service" for FOCUS. The first merely provides for staff support. The second is "developing, collecting and sharing information of mutual interest . . . [and] . . . analyzing and assessing external proposals and initiatives that may be of potential interest to FOCUS members." The third service level calls for "common action on issues that will promote the interests of FOCUS members" and establishment of "a communication and information linkage to various external state, federal and local agencies whose actions impact the interest of FOCUS members."

As a West Linn City Council member and now as a Metro Councilor, I have interpreted FOCUS' principal purpose to be as a forum for the exchange of information on common concerns among local government executives and elected officials. This implies working to resolve those concerns, as well as implementing

solutions to problems we all share in providing services to the public. I had hoped FOCUS would continue to serve as a place for sharing ideas and innovation in addressing ways to provide urban services more efficiently.

The direction of FOCUS in recent months, however, has led me to the conclusion that its original intent is being lost. Recent actions of the FOCUS steering committee have centered on issues specific to Metro rather than on public service provision, which raises serious concerns regarding Metro's continued FOCUS membership.

The concerns I have about this direction begin with issues of empowerment. It seems that FOCUS is overly dependent on direction provided by its steering committee and contract staff, with little opportunity for comment from its many members. The result - for good or ill - is that FOCUS is changing from a forum to an advocacy group. This creates two problems:

1. Duplication

Recent actions by, and work plans for, FOCUS have identified issues of Metro's financial structure and implementation of the Metro Charter as paramount in FOCUS' agenda. My concern is that the Charter's creation of the Metropolitan Policy Advisory Committee (MPAC), with representation from local governments through the Metro area, is charged with advising Metro on certain matters identified in the Charter. MPAC is the logical forum for Metro to use in discussing these issues with local government; indeed, it will become such a forum. FOCUS does not need to duplicate this process, nor to spend public dollars to do so, as is being considered. Until MPAC is fully operational, the Regional Policy Advisory Committee (RPAC) serves a similar function for communication.

2. Absence of action on local government service issues

FOCUS' concentration on Metro issues significantly detracts from energies that could be spent on local government issues. The principal illustration of this is the lack of a coordinated response from FOCUS to the recommendations of the Goldschmidt task force on local government. Those recommendations have been known for months, and yet we have seen nothing concrete from FOCUS in the way of commentary, discussion, analysis, or implementation of any of those recommendations. The focus of the Goldschmidt group was on local governments in the tri-county metropolitan area, which would logically play directly into the activities of FOCUS. The Goldschmidt report, and a package of related bills before the legislature, have not received an airing from FOCUS, much less a coordinated plan of action in response. I must conclude that the FOCUS steering committee's preoccupation with Metro has led it to ignore the single most significant study

of the potential for local government cooperation in recent history; those issues should be of paramount importance to a group whose purpose is to cooperate in the provision of urban services.

In addition to the primary issues discussed above, I also have concerns about issues of process. These begin with the process for selecting steering committee members. The FOCUS by-laws call for the steering committee to consist of representatives of member governments "from within each of Multnomah, Washington, and Clackamas Counties," and for steering committee members to be nominated by member governments from each of the three counties. These requirements call into question the possibility of a Metro elected official ever being nominated, much less elected, to the steering committee because Metro is not "within" any of the counties. It is not likely that member governments from any of the counties will nominate a Metro official to represent their county, as we are all elected in part to maintain a broader, regional view.

There is also an issue with notice of meetings of the steering committee and subcommittees not being adequately distributed. It is critical that notice of these meetings be widely disseminated, in order to improve intergovernmental communication and provide the broadest opportunity for people to attend. I understand the current practice is to notify city managers and county administrators, but there is no consistency in notices going any farther than that. A process for providing better notice of these meetings needs to be developed and implemented. Because public funds are being spent, and decisions made, I believe public meeting laws would apply - in spirit, if not by the letter of the law.

The final process issue I would like to raise concerns the propriety of steering committee members making presentations to other joint bodies, such as RPAC and MPAC, without consideration or direction from the full FOCUS membership. This has occurred, and should not recur.

I plan to place on the agenda of the March 18 meeting of Metro's Governmental Affairs Committee a resolution calling either for Metro to remain a FOCUS member or to drop our membership. In determining what direction to recommend to the rest of the Metro Council, I hope to hear from many of you before the meeting and I encourage you to come to the meeting to testify. One of the points I would like to discuss is the idea of placing the work program of Portland State's Institute of Portland Metropolitan Studies higher on FOCUS' agenda than the current projects it is considering. The non-partisan, regional agenda of the Institute

Local Government Officials - FOCUS
March 4, 1993
Page 4

seems very well-suited to earn the support and cooperation of FOCUS.

Please give me a call to discuss the issues I have raised here, or to talk about other issues related to FOCUS. Also, I hope to

see you on March 18 for the Governmental Affairs meeting, beginning at 4:00 in Metro's Council Chamber. Phone numbers are:

Office: 656-0399
Metro: 221-1646
Fax: 656-5667

Thank you very much.



METRO

March 25, 1993

Commissioner Tanya Collier
Multnomah County
1120 SW Fifth Ave.
Room 1500
Portland, OR 97204

Dear Commissioner Collier:

I want to thank you for coming to the Governmental Affairs Committee meeting last Thursday to discuss issues concerning Multnomah County's library and corrections levies. I appreciated the opportunity to have the good discussion we had regarding Metro's positions and potential policies on non-Metro ballot measures.

I committed to you at that meeting that we would develop and consider, in short order, a policy for Council consideration regarding Council positions on ballot measures. I had hoped we would be able to have a draft policy before us at our April 1 meeting, but the time demands on Councilors and our staff have forced a delay until our April 15 meeting.

I hope this delay will not cause you any inconvenience, and hope you will be able to come talk with us again when we have a draft policy to consider.

Thanks again for taking the time to meet with us last week.

Sincerely,

A handwritten signature in dark ink, appearing to read 'Mike Gates'. The signature is fluid and cursive, with a prominent 'M' and 'G'.

Mike Gates
Councilor, District 5



METRO

October 19, 1993

To All Interested Parties:

Late last year, the Metro Council announced the formation of the Metro Committee for Citizen Involvement (Metro CCI). The group has been working for almost a year, assisting Metro with our process of citizen involvement.

The bylaws for the committee state that the initial membership will serve from one to three years. At the end of this year, one-third of the membership will have their terms end. The representatives from our district, District 5, are included. The bylaws direct us to cast a wide net, and we are soliciting applications from the entire area. It is hoped that you might consider the possibilities in becoming active in this committee and apply, or perhaps that your association may nominate someone willing to commit time to this endeavor.

I have enclosed an overview of the committee, application and a copy of our Metro Passport brochure. You may note that the Council districts have been reapportioned and the new configurations will be effective for Councilors taking office in January, 1995. We will be working to reconfigure the membership of the MCCI to follow those reapportionments.

The deadline for consideration in this round of the selection process is November 5, 1993. We are asking that the county citizen involvement groups forward nominations by November 23 and Council should complete their actions by the end of the year.

We recognize these dates are fast approaching. However, applications received after this date will be held for review in filling future vacancies.

(over please)

The Metro CCI is currently meeting on the fourth Thursday of each month, from 6 to 8:30 p.m.. The Steering Committee meets the first Thursday of the month at the same time period.

If you need additional information or forms, please contact Judy Shioishi in the Metro Council Office, at: 797-1539. If you have other questions about Metro, the Council or programs Metro operates, please feel free to give me a call, at: 797-1545.

I appreciate your assistance and consideration in this matter.

Sincerely,

A handwritten signature in cursive script, appearing to read "Mike Gates".

Mike Gates
Metro Councilor, District 5

Enclosures: MCCI overview
MCCI application forms
Metro Passport

The Oregonian

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SATURDAY, MAY 15, 1993

Silk purse or sow's ear?

Metro must offer better evidence of why a new Wilsonville transfer station would benefit ratepayers

To anyone who has to deal with the headache of getting rid of garbage, the proposed transfer station in Wilsonville seems like a dream come true.

Here's a fully approved site that faces no neighborhood opposition located in a part of the region likely to experience significant future population growth. The temptation will be high for Metro councilors to sign on the dotted line when the Metro staff finishes negotiating an agreement with Willamette Resources Inc., the private half of this private-public partnership.

Instead, councilors should ask that most basic question: Is this additional transfer station still needed?

The Wilsonville station makes lots of good political sense. It would round out the deal struck between Washington County and Metro about how to handle westside garbage. It would relieve the overuse of the Metro South station in Oregon City. It would provide additional convenience to the 25 percent of the population that occasionally hauls its own waste.

But the cost of adding a transfer site would be significant. Bob Martin, Metro's solid-waste director, estimates that the new facility could add \$4 to \$5 a ton to the \$75-a-ton tipping fee.

That's a sizable jump in tipping fees that already have skyrocketed from their \$16.50-a-ton level five years ago.

Building a new transfer center now seems particularly questionable since the region's existing transfer center in North Portland is underused. Metro could deal with the capacity problems in Oregon City by routing some haulers to the Portland site. Reconfiguration of the Oregon City station might also relieve some of the delays caused by its heavy use.

Metro councilors also should examine just how much additional garbage is likely to be generated by the projected population growth, considering the trend — and Metro's commitment — toward more recycling.

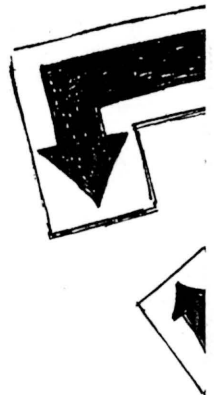
The answers to those questions might point to the need for another transfer station. Or they might indicate that the more sensible course is to delay — and perhaps decide against — adding this piece to the solid-waste system.

Metro Councilor Mike Gates is putting many of these questions before the council. For the station to proceed, the answers must demonstrate that ratepayers would be the clear and primary beneficiaries of developing the Wilsonville transfer station.

What's your plan, Mr. President?

Clinton needs to spell out

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WASH



LETTERS

Women likely will in rear echelons,

To the Editor: Re-
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503 228-7352

Focus Metro Council
From Councilor Gabe

MEMORANDUM

Date: January 13, 1994
To: FOCUS General Membership and Interested Parties
From: Greg Chew, FOCUS Staff
Subject: Packet for FOCUS Meeting Jan. 20

The next FOCUS (Forum on Cooperative Urban Services) is scheduled for:

Thursday, January 20
5:30 p.m.- 8:00 p.m.
West Linn City Hall
(22825 Willamette Drive, Highway 43)

This month's topic will be on building codes. Also, a special presentation will be made on the progress of the FOCUS Governance Committee's work. Dinner will be provided for a donation of \$5.00.

Enclosed for the meeting are the following: Agenda; Meeting Notes from the November 18 General Membership Meeting; Results from Post Presentation Survey on Housing; and Issue Backgrounder on Building Codes.

You should have received information about the upcoming FOCUS/PSU Institute on Metropolitan Studies Leadership Conference. If you have not received the brochure or would like some more information about the conference, please call 725-5170. The conference is scheduled for:

Leadership Conference-Tools for the Trade
Saturday, January 29
Registration until 8:30 a.m.
Conference ends at 3:15 p.m.
Atrium at Emanuel Hospital
(directions on brochure)

If you have any questions please give me a call at 228-7352.

Directions to West Linn City Hall

City Hall is located on Highway 43 in West Linn. Take I-205 to the West Linn-Highway 43 exit (this is where I-205 crosses the Willamette River). Go south on Highway 43 for about a quarter mile. The city hall is 2 story brick building on the right (west) side.

Planning
Public Involvement
Project Management
Landscape Architecture

**FOCUS
GENERAL MEETING**

Thursday, January 20, 1994

**5:30 p.m. - 8:00 p.m.
West Linn City Hall**

AGENDA

- I. Approval of November 18, 1993 General Membership Meeting Notes
- II. Building Codes Issues
 - Panel Discussion
 - Margaret Mahoney, City of Portland
 - Jim Kenworthy, City of Beaverton
 - Clint Hilman, City of Gresham
 - Bob Kelly, Washington County
 - Participants discussion, questions and answers with panel
 - Exit questionnaire
- III. Presentation by FOCUS Governance Committee on Work to Date
- IV. What's Going On in Member Jurisdictions
- VI. Other Business
- V. Adjourn

FOCUS
Results from the
Housing Presentation
Post Presentation Survey
November 18, 1993

Rating Scale

1= Poor idea
2
3= Average idea
4
5= Excellent idea

Mean Scores
(n=12)

"Idea to be pursued"

Percent who
think idea should be
examined by FOCUS

4.58	75%	A Housing Trust Fund for the Portland Metropolitan region should be created.
4.08	33%	Fair share housing needs to be regionally implemented and enforced. This is where every city and unincorporated area agrees to accept affordable housing.
3.67	42%	A Real Estate Transfer Tax should be used for housing, not planning.
3.58	33%	There should be a CHAS program region-wide.
3.50	17%	There is too much duplication of effort to chase after too few state housing grants. Instead, there should be more coordination amongst local jurisdictions and non-profit agencies.
3.50	17%	The region needs to decide as a whole what priorities are most important and fund them accordingly.
3.33	8%	A regional approach is the only way to address this problem because local elected officials will succumb to local pressures.
3.17	42%	Jurisdictions should adopt inclusionary zoning which requires each housing development of a certain size to include affordable housing.
3.08	17%	Land banking by a local jurisdiction may be a possible way to ensure affordable and special needs housing.
3.00	17%	Low income housing should receive System Development Charges relief and fee waivers in order to make them more affordable.
2.75	17%	A catalog of fees, SDCs, etc, should be developed to help developers successfully work with the system.
2.67	0%	A regional advocacy group needs to be created to help promote regional solutions.
1.50	0%	Building codes should be relaxed for low income housing to make it more affordable.

**FOCUS
Forum on Cooperative Urban Services**

**MEETING NOTES OF THE
November 18, 1993 MEETING
Two World Trade Center Plaza Conference Room**

Participants Present

Chair Bonnie Hays, Washington County
Don Allen, City of Sandy
Dan Anderson, Bank of America
Greg Chew, McKeever/Morris, Inc.
Vince Chiotti, Human Solutions Inc.
Gary DiCenzo, Clackamas County
Walt Hitchcock, City of Sherwood
Gretchen Kafoury, City of Portland
David Lawrence, City of Hillsboro
Scott Lazenby, City of Sandy
Ned Look, Portland Future Focus
Terry Moore, Metro
Steve Rhodes, City of Tualatin
Steve Rudman, City of Portland
Alice Schlenker, City of Lake Oswego
Ethan Seltzer, Portland State University Institute of Metropolitan Studies
Forrest Soth, City of Beaverton
Eric Sten, City of Portland
Jim Winkler, Winkler Companies
Susan Wilson, Washington County
Neal Winters, Tualatin Hills Parks and Recreation District

1.0 Approval of August Meeting Notes

Participants were asked if there were any changes to the Meeting Notes of the October 21 meeting. There were none. The General Membership approved the Meeting Notes as written.

2.0 Discussion of Housing Issues

The members on the discussion panel on housing issues included:

- Susan Wilson, Washington County
- Gary DiCenzo, Clackamas County
- Gretchen Kafoury, City of Portland
- Steve Rudman, City of Portland
- Vince Chiotti, Human Solutions Inc.
- Dan Anderson, Bank of America
- Jim Winkler, Winkler Companies

After the panel discussion and presentation, participants had questions and comments on this issue. A post-presentation survey was conducted.

For a complete review of the panelist presentations and the questions and comments, a videotape of the meeting is available. Please see the note at the end of this document.

3.0 FOCUS Business

Two items were discussed for action: (1) cancellation of December General Membership meeting; and (2) January 29 Leadership Conference.

3.1 Cancellation of December General Membership Meeting

Due to holidays, members were asked if the December General Membership meeting should be cancelled. If so, staff member Greg Chew asked what should be done with the budget allocation for that meeting.

Participants agreed that December meeting should be cancelled. They discussed what to do about the funds. One suggestion was to use the funds to help pay for hiring an out-of-area speaker for the FOCUS/Institute of Metropolitan Studies Leadership Conference. Participants agreed with this idea.

A motion was made and approved to cancel the December meeting and use the funds for paying for a recognized outside speaker for the January 29 Leadership Conference.

3.2 Discussion on FOCUS/PSU IMS Jan. 29 Leadership Conference

Mr. Chew asked for input from participants about ideas for the Leadership Conference. Mr. Chew asked members if they had any suggestions about speakers. Members provided input on some suggested speakers and provided additional names of potential speakers. Mr. Chew stated that the FOCUS staff, in conjunction with Ethan Seltzer of the Institute, would look into the possibilities of these suggested speakers.

4.0 What's Going On with Member Jurisdictions

Participants were asked of current activities in their jurisdictions. The following were mentioned:

- Tualatin: conducted 200 interviews with 35 interview teams on what residents want in city services;
- Beaverton: urban services boundary issues are in the LUBA process;
- Sandy: a food services tax-free ordinance is being considered; a satellite Calthorpe study is being conducted; and by 1995 there will be no smoking in restaurants in city limits;
- Sherwood: System Development Charges were raised to \$8,000 per dwelling unit;
- Tualatin Hills Parks and Recreation District: passed a fixed rate serial levy;
- Metro: in process of receiving comments on the Metro Tax Study Committee's report and update on 2040 process; and
- Washington County: just participated in the Association of Oregon Counties annual conference in Seaside.

5.0 Adjourned

Chair Hays thanked the Tualatin Valley Community Access for videotaping the meeting and the speakers for their presentations. The meeting was adjourned at approximately 8:15 p.m.

Meeting notes by Greg Chew

For a videotape of this meeting, produced by the Tualatin Valley Community Access, please contact Greg Chew at 228-7352.

In FOCUS:

Building Codes

Issue Backgrounder, January, 1994

OVERVIEW

This Issue Backgrounder is the sixth in a series of newsletters which FOCUS will produce each month this year. The purpose is to provide a summary of key issues of common interest to FOCUS members. This Backgrounder is devoted to the issue of building codes.

FOCUS staff used two methods to develop this information. A roundtable discussion was held on January 6 with the following parties:

- Jim Kenworthy, City of Beaverton
- Margaret Mahoney, City of Portland
- Bill Brandon, City of Happy Valley
- Bob Kelly, Washington County
- Ken Don, City of Gresham
- Jerry McKee, City of Hillsboro
- Alan Langendorf, City of Sandy
- Joanne Stetzel, City of Tualatin

Also, a survey was mailed to FOCUS members. At press-time, responses from an additional seven jurisdictions had been received. These responses are also summarized here.

The information presented here lists:

- Current building codes issues faced in the Portland Metropolitan region;
- Current activities by local jurisdictions; and
- Possible suggestions to consider by local jurisdictions.

The Forum on Cooperative Urban Services (FOCUS) is an organization comprised of most of the cities and counties and many special districts in the tri-county metropolitan area. The purpose of FOCUS is to provide a means for these governments to share information on issues of common interest, and identify areas in which cooperative action would produce benefits in the quality or cost-effectiveness of government services. McKee/Morris, Inc., is a consulting firm which provides staff assistance to FOCUS.

For more information, call Mike McKee or Greg Chew at 503 228-7352, or fax 503 228-7365. Write FOCUS c/o McKee/Morris, Inc., 722 S.W. 2nd Ave., Suite 400, Portland, Or, 97204.

BUILDING CODES ROUND TABLE DISCUSSION AND SURVEY RESPONSES

Major obstacles and challenges:

The following is a list of issues raised by one or more official(s) in the metropolitan region on building codes services. Although these issues may not be the same for each jurisdiction, they are in the nature of the issues faced by at least some building departments.

- The numerous and complex codes associated with building codes create confusion for the public and the building industry.
- Many design professionals do not have adequate code knowledge. At times, design professionals or contractors act as if building inspectors are purposely trying to find fault with their plans, when in reality building inspectors are trying to create a safer environment.
- The building codes are used to enforce issues not related to structural or life safety. Yet funding to administer these other areas is often not provided. Also, the amount of time available for individual inspections is severely reduced at the same time more aspects of construction need to be inspected.
- With different inspectors for different functions, tension is created when an inspector does not identify a problem another inspector will identify.
- There is a perception that inspectors want to delay development when oftentimes building departments are inundated with plans and inspection requests while still trying to ensure the safety of the construction.
- There is a great deal of variation in how building department fees are handled in jurisdictions of the region. For instance, some jurisdictions use building inspection fees

to fund services in the building department while other jurisdictions use a portion of the fees to feed the general fund. This creates wide disparities in service fees and service schedules for jurisdictions within the region.

- Incomplete plans are often submitted and building inspectors are expected to act as project supervisors and detail what is missing. This takes time away from providing the services that building officials are mandated to provide.
- Although there are statewide codes for building, electrical and mechanical aspects, ordinances in each jurisdiction may vary, making it difficult for the public to be adequately educated when they work in a different jurisdiction. Complicating this matter are code changes due to new regulations, ordinances, etc. This makes it even more difficult for the public, much less the building officials.
- Continuing education credits are often difficult to obtain due to the limited number of classes and locations offered.
- New mandates (state, federal, etc.) are not accompanied by the necessary funding to carry them out.
- A large number and vast variety of inspections are needed, often in a timely manner. Yet, staff cuts leads to longer waiting periods for service, and less time for education, coordination and follow-up.
- Permit fees for structural and mechanical permits are frozen by state statute at 1979 levels.
- The lack of uniform statewide fire code requirements causes problems.

CURRENT ACTIVITIES BY LOCAL JURISDICTIONS

Gresham

Gresham has a full service department with an electronic permit tracking and issuance system. They are considering providing permit application services after hours and data computers in the field to increase efficiency. Customer service is monitored through surveys and evaluations. Gresham has intergovernmental mutual aid agreements with Troutdale and Sandy and provides inspections in East Multnomah County through a contract with Multnomah County. Coordination also occurs through sharing information and education through a technical committee and a computer bulletin board. Structural changes being considered to increase efficiency are combining community development and engineering, and assigning a team to each project to see the project to completion instead of letting it float between the departments.

Sandy

The city provides limited services with Clackamas County doing electrical inspections and contracting out for plumbing inspections. They have weekly development meetings and provide surveys to developers regarding the completed projects. Sandy does not have a computerized system.

Beaverton

Beaverton is a full service agency and has two staff members certified in each specialty and one in single family plans. They provide permits by fax and mail as well as in person. They have a direct link to a code enforcement officer who is

responsible for code compliance. The agency has its own board of appeals for complaints. They coordinate with other jurisdictions through the exchange of ideas and are active in the state code change process through the Oregon Building Officials Association.

Washington County

Washington County is a full service agency that coordinates and works with all the cities in its jurisdiction by sharing staff when demand is high and working together to develop uniformity in code interpretation. The customer service priority is exercised through a home owner night, where the agency is open late, having permits accessible by fax or mail, and distributing a customer service survey with each permit. An automated inspection phone service which tells the status of permits and takes requests is currently being implemented. Four staff members are cross trained and chemists are on contract for inspections of hazardous occupancy buildings. There is also an implant program where the staff checks plans and permits, and does inspections at the same time for commercial buildings on a tight time schedule. The department also does surface water management for the unincorporated areas.

Tualatin

The city provides full service, with the exception of electrical inspections which are contracted out to Washington County. All inspectors are certified in structural, plans, and mechanical inspection with some staff having additional

certifications. They have not had any formal citations to date. Their system is not computerized. Tualatin coordinates with other jurisdictions to administer the codes accurately and uniformly and to provide additional staff when needed.

Portland

Portland provides a full service bureau that also is responsible for housing, dangerous buildings, demolition, noise compliance, and code compliance issues. Half of the residential inspection staff is cross-trained and there is a full engineering staff. They coordinate the permit application center, which sponsors "Homeowner Nights" to meet the needs of home builders. They also have a special inspection and certification program. The bureau has five code hearings officers assigned to listen only to code compliance cases. They have an implant electric program in which a building inspector is on site to do inspections as needed to help speed the building process. Portland has intergovernmental agreements with Multnomah County for a joint code committee to look at policies and to conduct internal regulatory reviews. They coordinate with hospitals, schools, and building associations in the Portland area. With the west side light rail project, Portland is coordinating with Washington County for the inspection responsibilities along the light rail line. They have a computerized tracking system and are looking into an automatic menu phone system.

Hillsboro

Hillsboro's Building Department has a full service inspection program and provides most plan review services. It also provides coverage to other jurisdictions when asked for assistance. Department staff works closely with Washington County, the Homebuilders Association, State agencies and other building related organizations. The city has assumed an aggressive cross-training program in lateral discipline training for its staff. In addition, the city is also examining upgrading computerization options.

Happy Valley

The city has limited service building inspection. They contract out for plumbing inspection and plan review. When demand is high, they call in building inspectors.

Clackamas County

The county offers a full-service building department, including engineering analysis and life and safety plan review. The county has adopted its own grading code and dangerous building abatement ordinance. The County contracts with Oregon DEQ to administer and enforce subsurface sewerage disposal regulations. The Building Codes Division also acts as building department for Milwaukie, Gladstone and 5 other cities in the county.

Clackamas County Fire District #1

The fire district's primary building code functions are to provide code compliance inspections in annual fire and life safety inspections, review plans and do inspections during the construction process. Construction site visits include thrust block checks, sprinklers, underground piping and final inspections for certificate of occupancy. The district coordinates with the building departments at Clackamas County, Happy Valley and Milwaukie on all construction projects.

Oak Lodge Fire District

The district provides many of the same services as the Clackamas Fire District #1. Oak Lodge works closely with Clackamas County Building Department in plans review for Uniform Fire Code and some joint inspections.

Milwaukie

In addition to the providing most building codes services, it also has an active code enforcement program which addresses nuisance and building code complaints. The Clackamas County Building Dept. provides services to the city in plumbing and electrical permit services and, depending on demand, assists in fire and life safety plan reviews.

Wilsonville

The city's building department is charged with reviewing all building construction projects for building, plumbing and mechanical code compliance through a plan review process. The city then ensures codes compliance. Clackamas County performs all electrical inspections within the city.

West Linn

The city performs most reviews and inspections except for electrical, which is performed by the county. The city's building department is considering joining COM-NET, an electronic mail communications network. This service will provide to subscribers a better means of communicating with other jurisdictions.

Lake Oswego

The city's building department provides full services on building, mechanical, plumbing and electrical codes. First reviews are also done on all those codes. The city also is in contact with surrounding jurisdictions and through the state via the Oregon Building Officials Association.

POSSIBLE RECOMMENDATIONS FOR CONSIDERATION BY LOCAL JURISDICTIONS

The following are suggestions that have been mentioned as possible recommendations for providing more effective building codes services. They do not represent the consensus opinion of the region's building codes officials, but rather serve as "food for further thought".

- ✓ Cross training (or having one inspector inspect more than one aspect of the building) of building inspectors should be considered. Cross training helps reduce staffing requirements.
- ✓ For each new requirement in the building codes services, an unnecessary requirement should be eliminated.
- ✓ Developing a full-time qualified fire marshal group at the local level should be considered.
- ✓ A regional computerized permit system which could be networked among entities sharing data should be explored.
- ✓ The State's role in code writing, certifications and determining training funding should be reexamined.
- ✓ A pool of qualified inspectors could be established for jurisdictions to draw from for peak loading, vacancies, illnesses, vacations, etc.
- ✓ The code should remain stable, without additions or changes, for a significant amount of time (such as three or even six years) so that the building industry and public can learn and understand the code. Only emergency amendments could be made.
- ✓ The customer should be able to take on responsibility for some inspections, such as having work done by a certified contractor.
- ✓ Building inspection should be code enforcement, not state licensing enforcement.
- ✓ Specialized inspectors are often necessary and could be "shared" by two or more jurisdictions (e.g., circuit-riders).
- ✓ It would be beneficial to have local attorneys help building officials to 'lobby' the legislature to provide more pertinent, efficient and effective building code services.
- ✓ Those portions of the code which are not life safety related, such as disability access or energy conservation, should be eliminated. Or, if they are not eliminated, then jurisdictions should realize that building departments cannot administer these additional programs without additional funding.
- ✓ Building departments should explore the increased use of computerization (e.g., permits could be purchased from different locations at all hours). Networking of building departments is also a possibility.
- ✓ Jurisdictions may want to explore the possibility of using administrative codes such as "Abatement of Dangerous Building" and "Uniform Housing Code" to increase effectiveness of the building code department.
- ✓ Requiring contractors, architects and engineers, and other building professionals to take continuing education on building codes requirements should be explored.
- ✓ Support of the insurance industry's efforts to rate buildings on safety risks on a nationwide basis is a possibility.
- ✓ The region may want to adopt common zoning definitions. Cities would apply zoning regulations within their own communities, but the definitions of each zone would be uniform (e.g., lot sizes, density, setbacks, etc.).
- ✓ The once-active Metro Building Officials should be reorganized again.



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Portland, Oregon 97204
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503 228-7352

PROJECT MEMORANDUM

TO: FOCUS GENERAL MEMBERSHIP
FROM: John Andersen, McKeever/Morris, Inc.
DATE: 1/14/94
RE: GOVERNANCE SUBCOMMITTEE

The FOCUS Governance Subcommittee has been charged by the FOCUS General Membership to provide several products related to public service (non-educational) delivery within the Portland Urban Growth Boundary:

- Matrix of Current Services
- List of Preferred Services
- Recommended Methodology for Local Service System Decisions.

Members of the Subcommittee are as follows:

- | | |
|---|------------------------------------|
| • Dan Bartlett, City of Milwaukie | • Ken Martin, Boundary Com. |
| • John Bonn, City of Portland | • Vergie Ries, City of Beaverton |
| • Ron Bunch, City of Lake Oswego | • Forrest Soth, City of Beaverton |
| • Charles Cameron, Washington County | • Forrest Soth, City of Beaverton |
| • Tom Coffee, City of Lake Oswego | • Kent Squires, Oak Lodge Sanitary |
| • Phillip Fell, League of Oregon Cities | • Mike Swanson, Clackamas County |
| • Lynda Jenkins, City of King City | • Jerry Taylor, City of Cornelius |
| • Dale Jutila, Clackamas Water District | • Don Carlson, Metro |
| • John Kelly, DLCD | |
| • Ned Look, Oregon Community Foundation | |

For your review the following documents are included:

- **Current Services Matrix** - a matrix of the public services provided within the Portland Urban Growth Boundary, sorted by type of jurisdiction that provides that kind of service.
- **Preferred Services Listing** - a list of the public services, with an illustrative identification of whether the Subcommittee members saw the service as mandated, essential or non-essential in urban and urbanizable areas.
- **Public Service Decisions Workbook; Table of Contents** - an annotated draft of the Table of Contents for the proposed workbook to be used by local governments in making decisions about which services to provide and in determining which agency should be the provider.

FOCUS Governance Subcommittee
McKeever/Morris, Inc.
November, 1993

▲ = service routinely provided by this type of agency

○ = service provided rarely (once or twice within the region) by this type of agency

NOTES:

1. A service provided by the city outside its incorporated area.
2. Includes franchised services.
3. Provided by service or franchise.
4. Informal Agreements for local and arterial streets.
5. Access from rural areas is needed through urbanizable areas (may be at a different street).
6. Within the USA service area, street cleaning is required and funded in order to comply with federal Clean Water Act requirements.
7. Neighborhood Association and CPOs may have differing service levels.
8. Includes other permits for total processing (e.g., Utility Permits).
9. Joint Private/Public Economic Development Agencies also exist.
10. Refers to transfer of Multnomah County Parks.
11. For low-income residents.

FOCUS GOVERNANCE SUBCOMMITTEE

PUBLIC SERVICE DECISIONS WORKBOOK TABLE OF CONTENTS December 22, 1993 DRAFT

I. INTRODUCTION

- General purpose and format of workbook
- General approach
 - all issues and options looked at thoroughly and objectively
 - no magic answers: local people ultimately responsible for decisions, technical data probably won't be decisive
 - process not expected to be easy, either analytically or politically (be prepared)
- Motivations for conducting the study
 - Public trust issues require thorough look at way governments deliver services
 - S.B. 122 compliance
 - Measure 5 pressures
 - Annexation
- Background on who and how the workbook was created (FOCUS/IMS)

II. PROCESS TIPS

- Begin with all service providers within each county represented
- Narrow list of participants, if appropriate, after initial analysis conducted
- Suggested cookbook for a successful process

III. SCOPE OF ANALYSIS

- Inventory the status of which entities are delivering all existing services (use FOCUS/IMS Existing Services Matrix as model)
- Select services or set of services for further analysis (all, S.B. 122, or some other subset)
 - study SB 122 requirements
 - take into account practical implications of transition when selecting services for study (i.e. don't spend time studying services with unrealistically high costs transition costs, or where political will does not exist to consider serious change)
- Determine whether analysis will be conducted for each individual service, or whether some services should be grouped together
- Determine geographic scope for each service to be analyzed
- Based on above, determine jurisdictions to be involved and develop overall process and organization for remainder of study

IV. EXISTING CONDITIONS

- For each service included in the study describe existing conditions
 - summarize nature of services provided
 - service areas and any physical factors which affect service provision
 - current financial, operational and managerial capacity
 - planned/approved long-term capacity expansion
 - existing and anticipated demand (including timing of need for any new capacity)
 - impacts of demographic, economic, sociological and technological change on future nature of service

- state and federal mandates affecting services
- regulatory compliance status and likely changes in regulation
- "sense of community" (shared values, priorities, plans, visions) in affected service areas
- how service is currently delivered (which entities are involved, their role, other delivery mechanism issues)

V. SORT SERVICES (THRESHOLD ONE)

The next three chapters represent key thresholds for the process. Agreement among the participants must be reached at each threshold in order to successfully proceed to the next threshold.

In order to meaningfully address who and how a particular service should be provided, it is first necessary to clarify or define the desired and/or expected level of service for the territory involved. Stated another way, different communities have different expectations for levels of service. Two types of analysis should be completed during this step:

- Determine for both urban and urbanizing areas whether each service is essential or non-essential (use FOCUS Preferred Services Matrix as model)
- Determine Level of Service

VI. EVALUATION CRITERIA (THRESHOLD TWO)

- Identify pertinent evaluation criteria for each service (use draft FOCUS/IMS criteria listed below as model)
 - Economic Value: given the preferred level and quality of services, the service is delivered at the least cost, taking into account capital, operating, and replacement and external costs associated with providing the service.
 - Accountability: citizens receiving the service understand who is responsible for providing the service and have an effective means of influencing their decisions.
 - Community Values: the service is tailored to reflect any unique characteristics or attitudes of the community of interest which is served.
 - Effective Policy Making: policy decisions are made to best serve long-term needs and to optimize the balance among the particular needs for this service and the needs of other government services and policies.
 - High Quality Service Delivery: services are delivered at a high standard of excellence given the particular level of service which has been determined to be appropriate.
 - Economies of Scale: the geographic area served and the size of the service provider is optimum (i.e., smaller when appropriate, larger when appropriate).
 - Fairness: costs and services are allocated equitably .
 - Transition Success: taking financial, legal, personnel, political and other impacts into consideration, it is realistic to expect that a transition to a new delivery system can be successfully executed (assuming the analysis indicates a change in the current delivery system is warranted).

- For each service weight the importance of each criterion. For example, for some services the "community values" criterion may be very important, in other cases the "economic value" and "economies of scale" criteria may be particularly significant.

VII. EVALUATE THE STATUS QUO (**THRESHOLD THREE**)

- Apply the weighted evaluation criteria to the current delivery system for each service to identify strengths and weakness.
- Identify those services where it appears there is substantial promise that improvements to the method of delivering the service might be found. In making this assessment take into account the practical realities of implementing a change, including transition and implementation costs.

VIII. IDENTIFY ALTERNATIVES AND EVALUATE (**THRESHOLD FOUR**)

- Identify alternative methods of service delivery, including formation of a new entity if appropriate for consideration
- Apply the weighted evaluation criteria to identify the strengths and weaknesses of each alternative. For each alternative identify the appropriate accountability role for the governments in providing the service (i.e., sole provider, partner with other providers, no direct role - providing encouragement and cooperation).
- Select preferred alternative and appropriate governmental role (again, taking transition issues into account to ensure that the change can realistically be implemented)
- After the preceding analyses determine the best method of service delivery (e.g. private service company under government contract)

IX. IMPLEMENT PREFERRED ALTERNATIVE (**THRESHOLD FIVE**)

- Develop timing/phasing plan
- Develop annexation plan if appropriate
- If the plan requires organizational change, address all issues set forth in SB 122
- Determine success measurements and method of monitoring and updating the plan

APPENDICES:

- A - Case Studies of applying the methodology
- B - Resources (articles, people)
- C- Model SB122 Agreement
- D - Relevant legislation (SB 122, SB 908)

**PREFERRED SYSTEM OF DIRECT LOCAL GOVERNMENT SERVICES
WITHIN THE URBAN GROWTH BOUNDARY
IN THE METRO AREA
FOCUS Governance Committee
December 1, 1993 DRAFT**

The goal of the Governance Committee's work is to design a methodology which assists local governments to reach agreement on which entities should be providing services to lands within the Urban Growth Boundary. The first step in that process is reaching agreement on the scope of direct local governmental services which should be provided in each county.

The matrix below represents the Committee's preliminary recommendations. This exercise was a useful step in the process of developing a methodology to assist the jurisdictions in preparing a similar analysis tailored to circumstances in their county. It was important to agree on certain assumptions and definitions, which are detailed below.

Initially, it was suggested that the terms incorporated and unincorporated be used rather than urban and urbanizable. However, the Committee's determination was that there exist in portions of the UGB areas that are unincorporated, but built-out to urban densities and deserving of services at an urban level. As a result the decision was to use the more pertinent designations rather than the simpler definitions.

Definitions and Assumptions:

- Urban Land - areas within the UGB which currently are primarily developed as urban uses (most of the land within the UGB falls within this category).
- Urbanizable Land - areas within the UGB which currently are substantially undeveloped or under-developed for viable urban uses, but which are planned for urban development in the future (constitutes a relatively small amount of land in the UGB; examples include the Tanner Basin and South Gresham Areas). Under the methodology used, as soon as the "urbanizable land" develops it becomes "urban land."
- Essential Service (E) - a service which should be provided directly by local governments if the goal is to provide all those governmental services which are fundamental elements of providing a high quality of life in the region (Note: this approach to defining essential services was purposely selected, in part, to keep the scope of analysis broad rather than narrow at the outset of the planning process. A definition of essential which focused more directly on health and safety issues, for instance, almost certainly would have resulted in coding fewer services as essential.)
- Non-essential Service (N) - a service may have benefits but is not essential for local governments to directly deliver in order to provide a high quality of life in the region.
- Mandated Service (M) - A service which local governments are required to provide by state or federal law.
- Direct Local Government Services - A service for which local governments play the lead role in ensuring that it is provided. The term lead role is not meant to exclude partnerships with other governmental or private entities. Nor is the term meant to imply that local governments need to directly execute all aspects of the service (i.e., contracting with other entities to perform a service would be included so long as the local government was accountable and responsible for ensuring that the service was provided.)

The passage of Senate Bill 122 has created a mandate for local governments within urban growth boundaries to develop a more coordinated system for service delivery. This study is meant to help in that process. It is also intended to assist other efforts to assure efficient and effective delivery of public services, including those that go beyond SB 122.

**PREFERRED SYSTEM OF DIRECT LOCAL GOVERNMENT SERVICES
WITHIN THE URBAN GROWTH BOUNDARY IN THE METRO AREA**

*Urban Services Agreements Required by SB 122

FOCUS
Governance Subcommittee
McKeever/Morris, Inc.
November, 1993

<u>Service</u>	<u>Urban</u>	<u>Urbanizable</u>
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Utilities

- Sanitary Sewer - Collection*
- Sanitary Sewer - Treatment*
- Water - Supply & Treatment*
- Water - Distribution*
- Surface Water Management
- Solid Waste Disposal
- Garbage Collection²
- Sewer/Water Planning*

E
E
E
E
E
E
E
E

N
N
N ¹
N
E
E
E
E

Safety

- Police (Rural Level)
- Police (Urban Level)
- Police (Special Functions)
- Fire Suppression*
- Fire Safety/Prevention
- 911 - Emergency Comm.
- EMS Planning
- Emergency Planning
- Prosecution
- Probation/Parole
- Corrections
- Law Library
- Juvenile Justice
- Justice Court
- Hazardous Material Process
- EMS - 1st Response/Rescue
- EMS - Transport³

N/A
E
E
E
E(M)
E
E(M)
E
E
E
E
E(M)
E(M)
N
E(M)
E
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E(M)
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E

Public Works/Transportation

- Street Constr. & Maint. (Local)*⁴
- Street Constr. & Maint. (Arterial)*^{4/5}
- Street Cleaning
- Street Lighting
- Traffic Control
- Transportation Planning
- Mass Transit*
- Special Transportation
- Airports⁷
- Water Transportation⁷

E
E
E ⁶
E
E
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E
E(M)
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E

N
N
N
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N
E(M)
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E

Community Development Ser.

- Citizen Involvement
- Business Regulation and Licensing
- Urban Growth Boundary
- Land Use Planning
- Development Permits⁸
- Nuisance Abatement/Code Enforcement
- Vector Control
- Animal Control
- Economic Development⁹
- Urban Renewal
- Energy Conservation

E
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E(M)
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N
N

Service**Urban****Urbanizable****Cultural Activities**

- Libraries
- Cultural Events (e.g., festivals, fairs)
- Cultural Facilities (includes museums)
- Sister Cities Programs

E
N
E
N

N
N
E ¹⁰
N

Parks & Recreation

- Regional Parks*
- Local Parks*
- Open Space*
- Cemetaries & Memorials
- Recreation Programs*

E
E
E
N
E

N
N
N
N
N

Health/Human Services

- Direct Health Services
- Public Health
- Environmental Health
- Aging Services (includes aging and challenged individuals)
- Housing
- Emergency Services (e.g., shelters, Chiars)

E
E(M)
E(M)
E

E
E(M)
E(M)
E

E ¹¹
E

E ¹¹
E

Other

- Assessment and Taxation
- Survey

E(M)
E(M)

E(M)
E(M)

NOTES:

1. Where economics of scale can be captured, this may be an E (i.e., build capacity to serve at urban levels before the land is urbanized).
2. Includes franchised services.
3. Provided by service or franchise.
4. Informal Agreements for local and arterial streets.
5. Access from rural areas is needed through urbanizable areas (may be at a different standard).
6. Within the USA service area, street cleaning currently is provided as part of legal agreements pursuant to federal Clean Water Act requirements.
7. A regional service provided by the Port.
8. Includes other permits for total processing (e.g., Utility Permits).
9. Joint Private/Public Economic Development Agencies also exist.
10. Should function as a resource to the entire Portland area.
11. For low-income residents.

ED WASHINGTON

1993-1995

**CITIZEN'S WELCOME
LET 'EM ALL CHAT'
WHATEVER THE SUBJECT
IT'S THEIR TURN AT BAT**

GEORGE VAN BERGEN

1983-1995

**ISSUED THE WATCH-ITS
THREW PUNCHES AND FLUFF
RESIDENT CURMUDGEON
MORE PRICKLY THAN TOUGH**

MIKE GATES

1993-1995

**CALM BE HIS WATCHWORD
EVIDENT WHEN HE SPAKE
THE ONLY REAL WORRY
IS THAT BIG EARTHQUAKE**

SUSAN McLAIN

1991-1995

**SCHOOL'S OUT, OR IS IT?
TEACHER HAS ISSUES TO THRASH
DEBATE TO CONCLUSION
OR UNTIL WE ALL CRASH**

JON KVISTAD

1993-1995

**SACRED MISSION
TAXPAYER'S SCROOGE
KEEP METRO LEAN
ALREADY TOO HUGE**

ROD MONROE

1993-1995

**FINANCE IS THE LEVER
GOT THE RIGHT CHAIR
LOAD GETTING HEAVY
PROBABLY LOSE ALL HIS HAIR**